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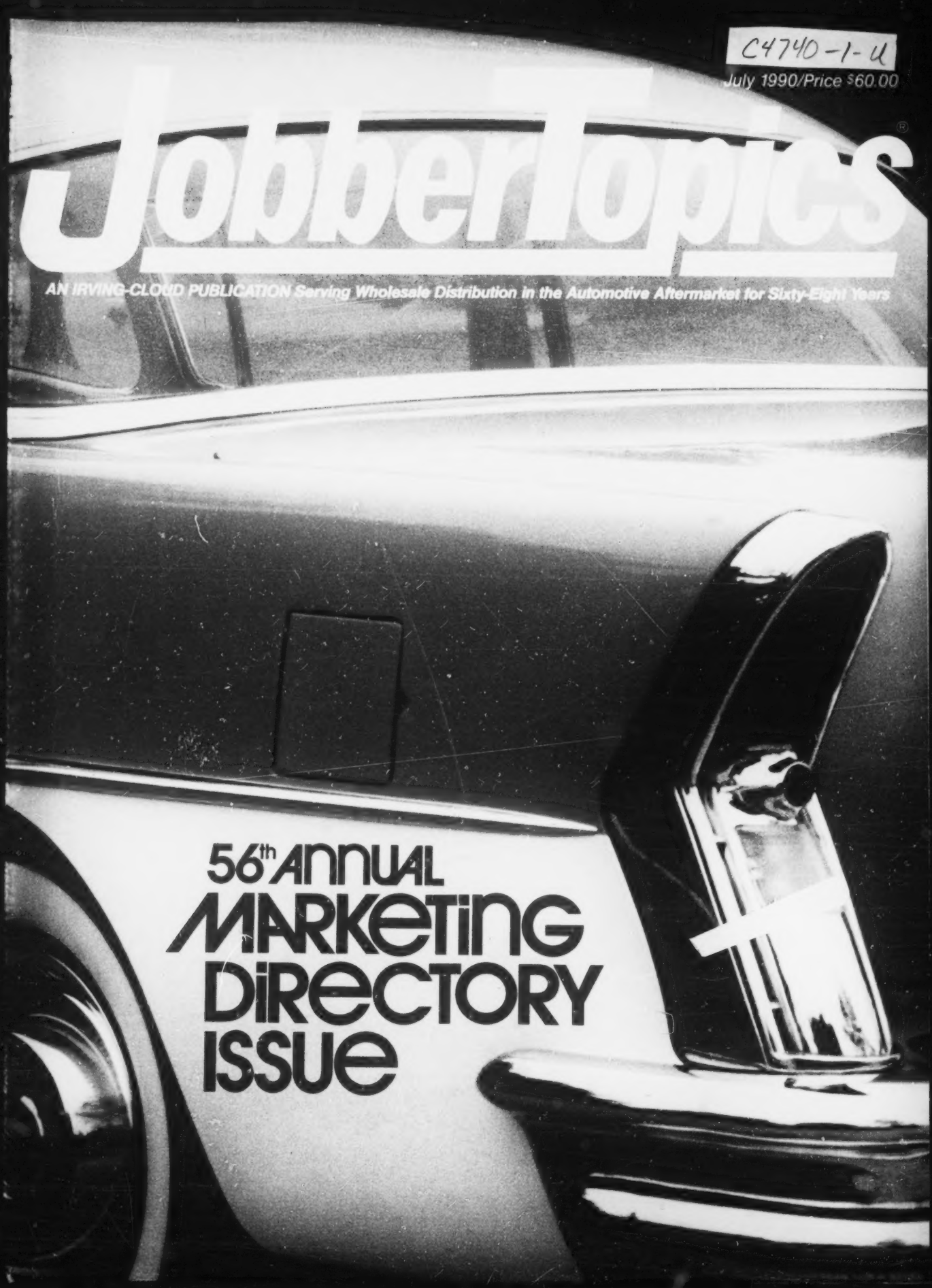
Jobber Topics®

AN IRVING-CLOUD PUBLICATION Serving Wholesale Distribution in the Automotive Aftermarket for Sixty-Eight Years



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JobberTopics

for automotive jobbers, warehouse distributors and their salesmen

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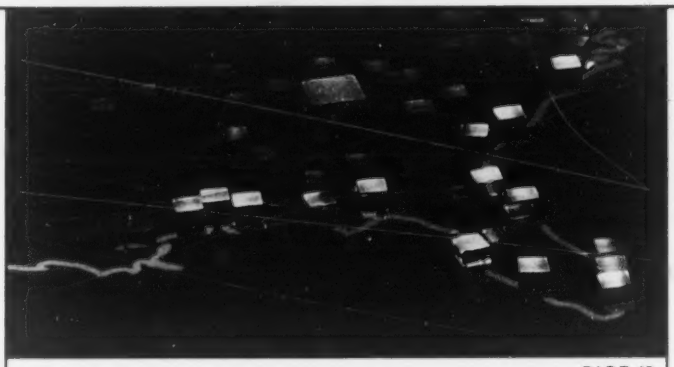

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Jobber Marketplace

With a majority of jobbers reporting increased dollar and unit sales for the first quarter of 1990, an aftermarket resurgence may be in the offing

By MARK PLOTNICK
Research Editor

In the lingo of the late comedian, Freddie Prinze, 1990 is "looking good" for automotive aftermarket parts jobbers. This is the clear statistical consensus gathered from over 300 nationwide jobbers participating in JOBBER TOPICS' annual "How's Business?" roundup survey for the first quarter (January through March) of 1990.

In our 1989 report on first quarter business, it was stated that "taken as a whole, present industry data are the best in this decade, and when compared to 1987 numbers, suggest a turnaround in the industry within the past 12 months."

Although it would be reckless to say the aftermarket, from a jobber's perspective, is entering a bona fide period of resurgence, overall jobber figures for the first quarter of 1990 are even stronger and more encouraging than the previous year. For the second consecutive year, significantly more jobbers are reporting improved positions in three key areas: total dollar sales, unit sales and collections. In fact, almost every region of the country is reporting better dollar and unit sales than a year ago at this time.

Adding further credence to the statistical findings are the personal comments volunteered by jobbers. Traditionally, jobbers have not been shy about using our surveys as a forum for legitimate, although sometimes pessimistic views of the industry or their own personal plights. However, our 1990 "How's Business?" roundup extracted a minimal amount of negative remarks from jobbers. In fact, several comments border on cautious optimism. One particular jobber bypassed the individual questions altogether and simply wrote, "best dollar sales ever." Sometimes words are enough.

Causalities?

Jobbers finding themselves in a stronger position than a year ago run the gamut of explanations for their individual successes. For example, a jobber from Missouri (Region 4) says his customers are returning for his quality of product, service and technical expertise—needs previously

FIRST QUARTER OF 1990 vs. FIRST QUARTER OF 1989
(Percent of Respondents)

Import Car Parts Sales

	Reg. 1	Reg. 2	Reg. 3	Reg. 4	Reg. 5	Reg. 6	Reg. 7	Reg. 8	Reg. 9	All Reg.
Up	63%	53%	40%	31%	36%	33%	46%	15%	79%	43%
Down	37	16	17	19	19	20	18	35	7	19
Same	0	31	43	50	45	47	36	50	14	38
	100	100	100	100	100	100	100	100	100	100

High Performance Parts Sales

Up	14%	22%	19%	23%	22%	13%	3%	14%	25%	18%
Down	29	22	34	17	41	27	33	38	32	31
Same	57	56	47	60	37	60	64	48	43	51
	100	100	100	100	100	100	100	100	100	100

FIRST QUARTER OF 1990 vs. FIRST QUARTER OF 1989
(Percent of Respondents)

Paint, Body & Equipment Sales

	Reg. 1	Reg. 2	Reg. 3	Reg. 4	Reg. 5	Reg. 6	Reg. 7	Reg. 8	Reg. 9	All Reg.
Up	43%	2[illegible]%	31%	39%	47%	50%	30%	37%	8%	29%
Down	32	22	24	26	25	17	30	26	32	25
Same	43	52	45	35	58	33	40	37	60	46
	100	100	100	100	100	100	100	100	100	100

Machine Shop Sales

Up	14%	27%	45%	38%	22%	18%	27%	20%	28%	31%
Down	0	14	18	24	13	36	35	40	24	22
Same	86	59	37	38	65	46	38	40	48	46
	100	100	100	100	100	100	100	100	100	100

Showing Signs of Recovery

abandoned for price. Another ties his improved position to price increases while others point to extended service programs (i.e. night deliveries), expanded machine shop services, higher profit import replacement parts, paint, body and equipment sales and the recovery of key regional industries.

Marty Butler, an experienced industry analyst and president of Distributors Institute, Inc., Chicago, has his own hunch about the present upswing. "Jobbers are becoming more sophisticated through computerization and programmed group activities. They are also seizing greater control of pricing strategies by relying less on manufacturers' price sheets which have led many jobbers to discount themselves into bankrupty."

In the final analysis, it will probably be safe to say that several factors are contributing to the present upswing.

Nationwide strengths

Postulates aside, dollar sales figures are the best in years. Sixty percent of all survey participants report better total dollar figures for first quarter 1990 than one year ago. When asked in 1989 and 1988, the figures were 40 and 33 percent respectively. Equally important is the relatively small percentage of jobbers (27 percent) reporting lower first quarter dollar sales than a year ago. This is the smallest group reporting a decline in years.

While smarter pricing may indeed be putting jobbers in a better position with respect to dollar volumes, a much improved unit sales outlook receives a share of the credit as well. Over 50 percent of all survey participants say unit sales are up over the first quarter of last year. This figure represents the second consecutive year of growth, from a 33 and 26 percent share reporting stronger unit sales in our 1989 and 1988 surveys respectively. Those with lower unit sales represent only 27 percent of all responding, the smallest group reporting a decline in the past three years.

Another encouraging business indicator is collections, traditionally soft in recent surveys. Although collections remain unchanged for the largest segment (49 percent) of respondents, those with improved collections (27 percent) finally outnumber those reporting a decline (24 percent).

Data on four types of business (import parts, high performance, machine shop and PB&E) are collected for this survey and according to the findings,

(Continued)

FIRST QUARTER OF 1990 vs. FIRST QUARTER OF 1989
(Percent of Respondents)

Dollar Sales

	Reg. 1	Reg. 2	Reg. 3	Reg. 4	Reg. 5	Reg. 6	Reg. 7	Reg. 8	Reg. 9	All Reg.
Up	55%	68%	68%	62%	57%	61%	46%	41%	56%	59%
Down	45	16	18	28	28	28	35	50	24	27
Same	0	16	14	10	15	11	19	9	20	14
	100	100	100	100	100	100	100	100	100	100

Unit Sales

Up	44%	54%	60%	53%	52%	47%	49%	41%	66%	54%
Down	44	14	20	31	33	24	32	55	19	27
Same	12	32	20	16	15	29	19	4	15	19
	100	100	100	100	100	100	100	100	100	100

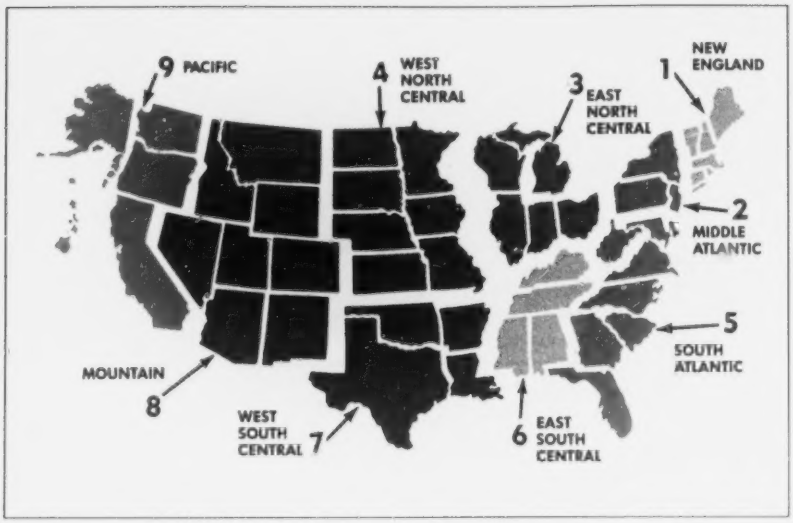
FIRST QUARTER OF 1990 vs. FIRST QUARTER OF 1989
(Percent of Respondents)

Collections

	Reg. 1	Reg. 2	Reg. 3	Reg. 4	Reg. 5	Reg. 6	Reg. 7	Reg. 8	Reg. 9	All Reg.
Up	22%	30%	26%	13%	41%	35%	22%	16%	32%	27%
Down	33	24	25	13	15	35	39	32	16	24
Same	45	46	49	74	44	30	39	50	52	49
	100	100	100	100	100	100	100	100	100	100

Inventory

Up	44%	48%	51%	48%	43%	45%	34%	46%	53%	45%
Down	22	27	16	15	12	22	15	18	24	18
Same	34	27	33	39	45	33	51	36	23	37
	100	100	100	100	100	100	100	100	100	100



Marketplace . . .

three are contributing to rising jobber dollar sales. The strongest of these is import part sales which are up for 43 percent of all respondents. Only 19 percent report this market down from the previous year and 38 percent report business unchanged.

Machine shop sales continue to improve on a national scale, but some regions are actually doing less business than the previous year. PB&E business is showing similar improvement overall, with almost every region of the country reporting better numbers than the first quarter of 1989.

Nationwide weaknesses

Happily, this year's business picture shows improvment on many fronts. The only disappointment, from a nationwide perspective, is the high performance market. Only 18 percent of all respondents say this business has improved over the first quarter of last year. This compares to 31 percent reporting business "down" while 51 percent say it is unchanged. These numbers represent a further decline in a market that was already weak according to the previous year's findings.

Regional update

Improving conditions are taking place in every region of the country with one exception. The Mountain states (Region 8), which ranked strongest in last year's roundup survey, have turned completely around from a year ago. The greatest number of negative business comments also comes from this region. "This has been the slowest period in 25 years," says a New Mexico jobber. "For the past 11 months, dollar sales have been bad and the Phoenix area is really taking it hard," explains another from Arizona.

In terms of overall dollar sales, the Middle Atlantic (Region 2) and East North Central (Region 3) areas are the most improved over 1989. The West Coast (Region 9) leads all others in unit sales strength and the South Atlantic States (Region 5) rank strongest in collections.

Highlighting the individual sales markets, import car parts sales are extremely bullish on the West Coast. Machine shop business is strongest in the nation's East North Central region and PB&E business is rising fastest in the East South Central states (Region 6). Only one region, the nation's breadbasket, had a net percentage of jobbers showing improvement over last year's high performance parts business.

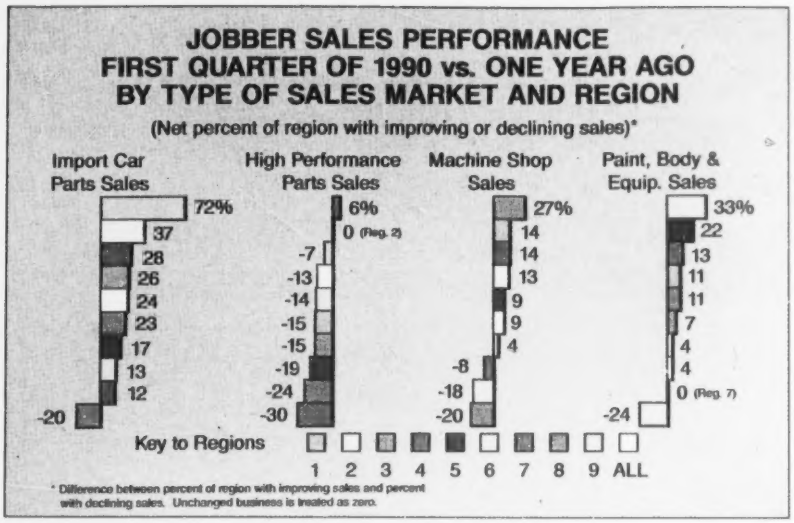
The following section briefly highlights regional activity.

Region 1—New England (Conn., Maine, Mass., N.H., R.I., Vt.): Compared to last year's first quarter business, this region has undergone the most impressive turnaround of any in dollar and unit sales. Still, area business lags behind national norms. Collections continue depressed, but less so than in comparable periods of 1989 and 1988. Machine shop sales are on the rise and import car parts sales continue strong for the second consecutive year.

Region 2—Middle Atlantic (N.J., N.Y., Pa.): After back-to-back years of negative growth in sales and collections, current first quarter data show this region unsurpassed in dollar and unit volume growth. A strong resurgence in import car parts volume (second only to the West Coast), solid improvement in machine shop sales and a modest improvement in collections are buttressing the area's comeback.

Region 3—East North Central (Ill., Ind., Mich., Ohio, Wis.): Second only to the Middle Atlantic states in rising dollar sales, jobbers of this region are also reporting a very strong turnaround in unit sales (after two years of very negative growth). Import car parts and machine shop business continue strong as does PB&E sales, but to a more modest degree. Collections are moving toward greater stability.

Region 4—West North Central (Iowa, Kan., Minn., Mo., Neb., N.D., S.D.): Jobbers in the nation's breadbasket continue to show strong numbers for the second consecutive year. Dollar sales, machine shop, PB&E and high performance (the only region to show any improvement)



numbers are all over national averages for the first quarter of 1990. Although up, the import parts market is growing less impressively here.

Region 5—South Atlantic (Del., Washington, D.C., Fla., Ga., Md., N.C., S.C., Va., W. Va.): This area is having a fine year compared to the previous two. Rising dollar sales is keeping pace with the national average as is machine shop and import parts activity. Two standout areas of business include PB&E sales and collections—the latter being strongest among all regions reporting.

Region 6—East South Central (Ala., Ky., Miss., Tenn.): The western portion of Dixie is also keeping pace with the national resurgence. Although machine shop sales continue to fall, the region is riding the best PB&E figures around the nation. A three year high in unit sales (plus a movement toward more stable collections) appears responsible for a three year high in dollar volume as well. As with most regions, jobbers here report a continuing decline in the high performance market.

Region 7—West South Central (Ark., La., Okla., Texas): Dollar sales continue to lag behind unit sales (deflation?) for the second year in a row, but both are improving. Collections are a major problem in the "oil patch," the weakest nationwide for the third consecutive year. Positive signs include a continued sharp rise in import parts volume and stabilizing PB&E sales. High performance business continues to be the most "bearish" in the nation.

Region 8—Mountain (Ariz., Colo., Idaho, Mont., Nev., N.M., Utah, Wyo.): After reporting the best sales, collections and cash position in 1989, the first quarter of 1990 looks like a regional funeral procession. With the exception of PB&E sales (running ahead of the national average) negative figures across the board indicate business has taken a dive. The few negative business comments received were concentrated in this region, although not specific enough to shed light on the matter. It will take another year's worth of data to put this occurrence into perspective.

Region 9—Pacific (Ala., Calif., Hawaii, Ore., Wash.): In last year's "How's Business?" roundup, *JT* reported, "if there is a region which can be called consistently prosperous for automotive parts jobbers, it should be the West Coast." Once again, first quarter findings show this to be true. Driving the region is a burgeoning import parts business which is apparently pushing the nation's strongest unit sales figures. Dollar sales continue to be strong, but lag behind unit sales. Jobber business is also being helped by a rise in collections—second strongest in the nation. Currently, the region's only depressed business (aside from the nationally weak high performance market) is in PB&E. Over four times as many jobbers reported PB&E sales "down" than "up" relative to the first quarter of 1989.

About "How's Business?" Surveys

Every month, JOBBER TOPICS polls a representative sampling of jobbers nationwide on various business conditions (dollar sales, unit sales, collections, inventory and overall business) relative to the previous month and year. The findings, gathered from all nine census regions (see map for demarcations), appear each month in JOBBER TOPICS as "How's Business?" and "Business Review."

Every April, readers also participate in the "How's Business?" roundup survey. This survey compares the current year's first quarter business (January through March) with the same period of the previous year. This survey not only examines overall business conditions, but the strength of each region in four specific sales markets: import parts; high performance; machine shop and paint, body and equipment. The findings from this survey are reported every July in JOBBER TOPICS' "Annual Marketing Directory Issue."

Forum Report Twelve-Month Retrospective

A synopsis of findings on salespeople, parts, advertising and clinics as viewed by jobbers during the past year

By MARK PLOTNICK
Research Editor

For' em: An assembly, place, medium or opportunity for the presentation of current questions or public matters.

For over 40 years, jobbers in the automotive parts aftermarket have had a forum to share their business practices, experiences and insights. This vehicle, JOBBER TOPICS' Forum Report, has helped jobbers better understand their industry.

Since 1948, Forum Reports have addressed more than 100 different industry matters on a rotating basis. In the process, JOBBER TOPICS has identified many of the trends and changes taking place. Of course, none of this would be possible without the cooperation of our readers, thousands of whom have taken part in Forum Report surveys.

Every July, as the dog days of summer approach, we pause to review some of the findings presented in our Forum Reports over the past 12 months. Six topics were examined: Counter and Outside Sales (August 1989); Remanufactured Units (October 1989); Supplier Salesmen (December 1989); Why Jobbers Change Lines (February 1990); Jobber Advertising (April 1990); Jobber Training and Clinics (June 1990).

Saga of salesmen

Arthur Miller's brilliant American play, "Death of a Salesman," opened our eyes to the plight of a warrior too often considered by business as "a necessary evil." In August of 1989, JOBBER TOPICS went to its panelists and questioned them about the people who man the counters and hit the streets in search of business.

Eighty four percent of our panel said they employed at least one outside salesman. This individual spends about half of his time in face-to-face selling, about the same amount as reported 10 years ago. The remainder of his time is spent traveling (17 percent), making service calls (9 percent), waiting for interviews (7 percent), adjusting complaints (5 percent), doing paperwork (4 percent) and non-productive activities (8 percent). One demand on a salesman's time has grown. Time spent on service calls.

To handle counter duties, the median jobber employs four full-time and two part-time counterpeople, but their duties don't necessarily end at the counter. Over one-third of those responding said their counterpeople do double duty by making outside sales calls. Perhaps this is why so many jobbers, almost half, have promoted one of their own counterpeople to outside sales.

How do jobbers recruit outside and counter sales staff? While a few look exclusively outside their organization, 27 percent promote solely from within. The majority, 64 percent, find it necessary to diversify their recruiting efforts to obtain the best people.

And what of the salesmen who call on the jobber? In December of 1989, the Forum Report addressed the effectiveness of "Supplier Salesmen," and jobbers across the country took

Reman Versus New Unit Sales

How do sales of remanufactured units compare, volume-wise, with sales of new items?

(Totals 100 percent per category)

	All Groups % Rebuilt	All Groups % New		All Groups % Rebuilt	All Groups % New
Differentials	99.4	0.6	Brake shoes & pad	75.4	24.6
Generators	99.0	1.0	Air brake valves	74.8	25.2
Alternators	98.4	1.6	Water pumps	73.7	26.3
Crankshafts	98.3	1.7	Air conditioners	73.1	26.9
Distributors	96.9	3.8	Brake master cylinders	72.2	27.8
Cylinder heads	96.5	3.5	Armatures	70.1	29.9
Drive shafts	96.2	3.8	Engine & engine parts	63.0	37.0
Torque converters	96.1	3.9	Transmissions & parts	53.8	46.2
Power steering units	95.8	4.2	Speedometers	52.3	47.7
Rack & pinion steering units	95.6	4.4	Stators	52.3	47.7
Smog pumps	95.3	4.7	Fuel injectors	44.9	55.1
Brake calipers	94.4	5.6	Starter drives	44.2	55.8
Power brake units	92.9	7.1	Solenoids	39.3	60.7
Axles (front wheel drive)	91.8	8.2	Catalytic converters	20.2	79.8
Starter motors	91.6	8.4	Fan clutches	18.2	81.8
Windshield wiper motors	89.2	10.8	Fuel pumps	16.7	83.3
Clutches & parts	88.0	12.0	Rotors	12.9	87.1
Power window motors	86.7	13.7	Voltage regulators	8.6	91.4
Turbochargers	85.6	14.4	Oil pumps	8.1	91.9
Carburetors	83.3	16.7	Shocks/struts	3.4	96.6

Distribution of Panel by Dollar Volume

Group 1 (under $350,000)

Group 2 ($350,000-$750,000)

Group 3 ($750,000 and over)

How Independent WDs Assist Jobbers

Do you receive advertising assistance from your WD suppliers who are not involved with programmed distribution?

	(Percent of respondents) All Groups
Yes	25
No	67
No response	8
	100

If yes, is this assistance provided on a co-op basis?

Yes	74
No	12
No response	14
	100

If yes, how are the advertising costs shared?

	(Average percent)
Manufacturer	41
Warehouse distributor	18
Jobber	41
	100

Which Reman Units Are Sold

Which of the following remanufactured units do you sell?

	(Percent total respondents) All Groups		All Groups
Alternators	96.8	Solenoids	51.3
Brake master cylinders	93.5	Power window motors	43.5
Clutches & parts	93.5	Axles (front wheel drive)	40.9
Brake shoes & pads	92.2	Drive shafts	39.6
Starter motors	92.2	Fuel pumps	29.2
Water pumps	90.9	Fan clutches	27.9
Carburetors	89.7	Torque converters	27.3
Brake calipers	88.3	Transmissions & parts	24.0
Power steering units	83.8	Fuel injectors	22.1
Power brake units	82.5	Rotors	22.1
Distributors	79.9	Oil Pumps	20.1
Generators	78.6	Voltage regulators	20.1
Crankshafts	75.3	Armatures	14.3
Rack & pinion steering units	73.4	Air brake valves	11.7
Windshield wiper motors	71.4	Shocks/struts	11.7
Engine & engine parts	63.6	Catalytic converters	8.4
Starter drives	58.4	Speedometers	7.1
Cylinder heads	56.7	Stators	9.7
Smog pumps	55.2	Turbochargers	5.2
Air conditioners	53.3	Differentials	3.3

*Totals over 100 percent due to multiple mentions.

Rebuilts Are Better Than Ever

Would you say quality and performance standards of remanufactured items have been raised in the past five years?

	(Percent total respondents) Group 1 (Small)	Group 2 (Medium)	Group 3 (Large)	All Groups
Yes	79.1	69.5	76.5	74.5
No	14.0	27.1	19.6	20.9
No answer	6.9	3.4	3.9	4.6
	100.0	100.0	100.0	100.0

Would you say such policies are generally satisfactory or unsatisfactory?

Satisfactory	79.1	74.6	78.4	77.1
Unsatisfactory	16.3	15.3	15.7	15.7
No answer	4.6	10.1	5.9	7.2
	100.0	100.0	100.0	100.0

this opportunity to hurl a volley of criticisms too numerous to list. In rebuttal, the president of a manufacturers' rep agency wrote JOBBER TOPICS in defense of dedicated supplier reps everywhere. His letter was shared in the May 1990 issue ("In Perspective") of JOBBER TOPICS. It was evident early on that the Forum Report on "Supplier Salesmen" would stimulate one of the heavier requests for reprints in recent years.

But beyond the fighting words are the findings. In recent years, the incidence of supplier sales calls on jobber customers has declined. And fewer salespeople are assisting jobbers with services such as checking stock, maintaining catalogs and price sheets, handling obsolescence and defective merchandise, planning clinics and informing jobbers of factory programs.

Unfortunately for these salesmen, the promise of assistance can be critical in making a sale. Almost half of our respondents say they added new lines based on a supplier salesman's assistance.

Perhaps shaping the jobber's tainted attitude is his perception of a salesman's authority. Only half believe direct factory salesmen have enough authority to make decisions in the field. The confidence level drops significantly when it comes to manufacturer's agents (36 percent believe) and WD salesmen (31 percent believe).

From people to parts

In October of 1989, "Remanufactured Units" was in the Forum Report

(Continued)

Functions Supplier Salesmen Perform

Which of the following sales and service functions do your supplier salesmen perform?

	(Percent total respondents) Direct Factory Salesmen	Manufacturers' Agents	WD Salesmen
Check stock	33.7	26.5	44.6
Inform you of additions to lines	62.0	54.8	69.3
Maintain catalogs & price sheets	47.0	39.8	51.2
Present factory programs	59.6	45.2	53.6
Handle obsolescence & defective merchandise	45.8	34.3	69.9
Plan dealer clinics & meetings	45.8	28.9	40.4
Make calls with your outside salesmen	47.0	31.9	31.3
Make new account calls	27.1	19.9	20.5
Sales clinics follow-up calls	24.1	18.1	24.1
Handle customer complaints	36.7	24.7	29.5

*Totals over 100 percent due to multiple mentions.

What Jobbers Consider When Adding a New Line

When considering a new line, what factors are most important to you?

	(Percent of total respondents) Group 1 (Small)	Group 2 (Medium)	Group 3 (Large)	All Groups
Customer demand	35	34	39	36
Inventory investment	42	37	29	36
Availability	19	42	22	31
Competitive pricing	16	20	30	22
Gross profit margin	13	14	27	18
Obsolescence protection	3	15	14	12
WD service	19	10	7	11
Factory service	6	8	10	8
Supplier sales assistance	3	7	5	5
Broadening a specialty	6	3	5	5
Input of own sales personnel	10	3	2	5
All other	—	—	—	6

*May total over 100% due to multiple answers
All other: Reliability (2%); Credit terms (2%); Supplier merchandising/advertising assistance (2%)

spotlight for the tenth time. Back in 1953, reman represented only 10 percent of a jobbers total dollar volume. In 1989, that number had leaped to 30 percent! The long-term trend reveals a strong reman market where demand continues to grow as concerns about durability soften.

One strong motivator to stock remans is profit. According to the latest findings, the median jobber reports maximum gross margins as high as 40 percent on remans. With this kind of potential, it's no wonder more jobbers prefer to sell remans than new items. JOBBER TOPICS' Forum Report found that alternators and starters are considered the best profit and volume producers among all remans.

Better quality has also contributed to the lessening of performance concerns and therefore heightened demand. Most jobbers agree that performance and quality standards of rebuilt items have been raised in the past five years. Almost eight in 10 consider the quality of today's reman products satisfactory. But quality problems still do exist and rebuilt carburetors, starter motors and alternators (the high volume components) are by far the biggest offenders.

Changing lines

Changing product brands is a fact of life for any marketer which can also be a monumental headache. But it is the cost of doing business. As one jobber put it, "We'll change any line that puts us into a more competitive situation."

In early 1990, JOBBER TOPICS sought the "why's," "what's" and extent of line changing among aftermarket parts jobbers ("Why Jobbers Change Lines," February 1990). By comparing three other Forum Report studies dating back to 1977, JOBBER TOPICS found the rate and pervasiveness of jobber line changing remained relatively unchanged over the past 12 years.

Present findings reveal six in 10 jobbers changing an average of three lines in the past year. Based on the number of lines a median jobber handles, roughly 5 percent of his inventory is affected.

Time has not changed the motivators for change either. Poor product quality and unsatisfactory order fulfillment have remained the two biggest irritants over the past 12 years. But supplier sales to jobber customers is inducing more jobbers to change product.

Of the product categories most often changed during a year's time, ignition and electrical lines (changed by one of every three jobbers) have consistently held top honors over the past 12 years.

JOBBER TOPICS also found four of every 10 jobbers adding a new line in the past year. These respondents cited customer demand, inventory investment and availability of product as the three top considerations when doing

so. Other data revealed only a small percentage of jobbers were cancelled on lines by their suppliers, while a minority (25 percent) discontinued a line completely for various reasons.

Madison Avenue—jobber style

In recent years, jobbers have become more comfortable with the notion of advertising their goods and services. While the jury is still out on advertising's cost effectiveness, the vast majority (80 percent) have given it a try in the past 12 months—from the "shotgun" approach to more sophisticated strategies. "Jobber Advertising" was the topic of our April, 1990 Forum Report and, despite the skepticism, the study found it alive and well with future prospects bright.

What JOBBER TOPICS has learned is that jobbers are approaching this marketing tool more judiciously than in the past. Advertising expenditures have steadily increased (as a percent of net sales) since 1971 and to keep these growing outlays under tighter control, almost half of those advertising now *plan* a budget specifically for advertising.

The study also found that almost every jobber belonging to a program group gets some advertising assistance. The average breakdown finds the jobber footing 42 percent of the bill while the manufacturer and warehouse distributor kick in 25 and 33 percent respectively. Only one in four independent jobbers receive assistance from their WDs who kick in 18 percent of the costs while the manufacturer and jobber share 41 percent each.

Since 1977, jobbers have been focusing a greater share of their advertising (currently 65 percent) on the retail trade while cutting back on traditional trade promotions (currently 35 percent).

To get their message out, jobbers use various types of advertising media on a *regular* basis. As of January 1990, jobbers reported the three most popular advertising media are posters/placards, newspapers and radio. They say newspaper advertising far outdistances all others with radio coming in a distant second.

When it comes to handling advertising chores, most jobbers are not yet ready for help from Madison Avenue. Seventy-four percent of our respondents say they handle the bulk of their advertising in-house with an owner or executive in charge. About 16 percent have outside help from a WD, advertising/public relation firm or program group (in that order).

Jobbers also promote through less costly means such as sporting events/team sponsorship and in-store displays—the most popular being baseball teams and posters/placards respectively. The majority of jobbers rely on display materials provided by their suppliers.

(Continued)

Top Reasons Cited for Line Changes

What are the most important considerations for changing a particular line?

	(Percent of respondents indicating as most important)			
	Group 1 (Small)	Group 2 (Medium)	Group 3 (Large)	All Groups
Poor product quality	34	34	33	33
Unsatisfactory order fulfillment	34	36	33	33
Supplier sales direct to jobber customer	24	17	21	20
Declining profit margin	21	19	18	19
Customer resistance or lack of demand	10	17	19	16
Inadequate obsolescence protection	7	15	6	12
Supplier sales direct to competitors in trading area	10	11	5	9
Poor cataloguing	7	9	0	7
Ineffective factory salesman	0	9	8	6
Ineffective WD salesman	3	4	3	3
Line change by the WD	7	2	3	3
Retailer competition	0	0	2	1

*May total over 100% due to multiple answers.

Groups Differ in Types of Lines Changed

Which of the following line categories have you changed over the past 12 months?

	(Percent of respondents indicating a change)			
	Group 1 (Small)	Group 2 (Medium)	Group 3 (Large)	All Groups
Ignition and/or electrical	17	31	36	30
Brake system parts	28	27	12	23
Fuel system parts	17	13	32	19
Engine parts	22	18	20	19
Chassis parts	17	13	16	15
Transmission, driveline or differential	6	16	16	14
Hand tools	17	13	8	9
Filters/belts/hoses	6	11	14	8
Exhaust system parts	11	4	8	7
PB&E/refinishing	6	4	8	6
All other	—	—	—	17

All other (3% or less): Shop equipment; lubricants/chemicals; air conditioning; hardware; seals and gaskets; cooling system; seat covers/materials; specific import parts

Advertising Expenditures

Last year's advertising expense was what percent of net sales?

	(Percent of net sales) Group 1 (Small)	Group 2 (Medium)	Group 3 (Large)	All Groups
Average jobber	4.4	3.3	2.4	3.4
Median jobber	2.0	2.0	1.0	2.0
What percent do you estimate for this year?				
Average jobber	4.4	3.5	2.5	3.4
Median jobber	2.0	2.0	1.0	2.0

Trend—Advertising Expenditures

Last year's advertising expense was what percent of net sales?

	All Groups 1971	1977	1983	1990
Average percent	0.8	1.0	1.4	3.4

Trend—Budgeting Funds for Advertising

Do you budget funds for advertising?

	(Percent of respondents)* All Groups 1977	1983	1990
Yes	37	37	48
No	60	61	51
No response	3	2	1
	100	100	100

*Those with advertising expenditures

80% of Jobbers Advertise

Jobbers who spent money on advertising last year:

	(Percent of respondents) Group 1 (Small)	Group 2 (Medium)	Group 3 (Large)	All Groups
Yes	86	81	74	80
No	14	15	19	16
No response	0	4	7	4
	100	100	100	100
Jobbers who plan to spend money on advertising this year:				
Yes	83	80	76	79
No	12	11	17	13
No response	5	9	7	8
	100	100	100	100

Although the data are significant, jobber comments kept returning to "word-of-mouth" as both the most cost effective and "American way" to build business.

Clinically speaking

If there was one Forum Report issue in the past 12 months that jobbers addressed in a unified voice, it was "Jobber Clinics and Training" (June 1990).

A sea of comments unanimously agreed: Training and clinics are tantamount to survival and growth in the automotive parts aftermarket, but jobbers perceive suppliers and the trade as apathetic.

From a sales standpoint, jobbers make it clear that clinics are quite successful in generating new business. Technical clinics (particularly about brakes, computer engine controls, air conditioning, suspension/front end and PB&E, in that order) are easily the best attended and most successful, although the small number of jobbers offering management skills clinics (currently 12 percent of those holding clinics) has grown impressively over the past 12 years.

Although jobbers talk clinics, only half of our respondents gave one in the past twelve months, the smallest group holding clinics in four surveys dating back to 1977. Perhaps jobbers are becoming discouraged with the growing cost of putting on a clinic and the declining attendance for both sales and technical clinics.

Presently, manufacturer suppliers are doing more than WD suppliers in regard to training and financial assistance. Jobbers give manufacturer training personnel and materials exceedingly higher marks as well. But the latest JOBBER TOPICS survey data show that WD's are more involved with clinic and training programs than at any time since 1977.

It will take less apathy from the trade, more support from suppliers and sustained action by jobbers to ensure that clinics and training are maximized in the '90s.

Thanks to all our panelists who cooperated with our surveys over the past 12 months and to all those who will in the next 12.

90/91

AUTOMOTIVE STATISTICS

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Automotive Wholesalers Among Largest in 1989

Based on Number of Branch Stores and Outside Salesmen

	BR.	Outside Sales	Shops
1. Action Auto Stores, Inc., Flint, Mich.	70	4	1
2. Arnold Motor Supply, Spencer, Iowa	19	46	19
3. Auto Parts Depot, Inc., Van Nuys, Calif.	15	3	3
4. Automotive One Parts Stores, Inc., Orlando, Fla.	25	4	2
5. Automotive Parts Co., Inc., The, Worthington, Ohio	19	15	6
6. Automotive Supply Co., Inc., Appleton, Wis.	14	20	6
7. B & C Auto Supply Corp., Anchorage, Alaska	13	6	—
8. Barnes Motor & Parts Co., Inc., Wilson, N.C.	25	30	4
9. Beacon Auto Parts Co., Jeannette, Pa.	20	9	6
10. Big "A" Auto Parts, Inc., Sanford, Maine	28	8	3
11. Blakenship & Co., Inc., E., Marion, Ill.	16	16	3
12. Burdman Auto Parts, Inc., Kirksville, Mo.	30	28	1
13. Burton Auto Supply, Inc., Weslaco, Texas	13	11	2
14. Byrd Auto Parts Co., Inc., Burlington, N.C.	15	2	3
15. Carquest Auto Parts, Lexington, Ky.	33	15	3
16. Centro Piezas De Caparra, Inc., Puerto Rico	17	4	8
17. Chanen's Auto Supply Co., Quincy, Ill.	14	10	1
18. Christie & Thomson, Inc., Worcester, Mass.	13	3	—
19. Conrasa, Calexico, Calif.	50	2	1
20. Crow-Burlingame Co., Little Rock, Ark.	60	59	3
21. Darling's Auto Parts, Bangor, Maine	14	10	1
22. Everson Co., H.E., Grand Forks, N.D.	18	15	—
23. Fairfax-Auto Parts, Inc., Fairfax, Va.	13	4	1
24. Flowers Co., The, Hickory, N.C.	17	6	2
25. General Auto Supplies, Inc., Albany, Ind.	14	10	4
26. Genuine Parts Co., Latham, N.Y.	101	10	2
27. Hedahls, Inc., Bismarck, N.D.	14	21	11
28. Holyoke Auto Parts & Equip., Inc., dba/Hapco Auto Parts, Holyoke, Mass.	18	5	—
29. Inter-State Auto Supply Co., Elizabethtown, Ky.	16	22	9
30. Jarvis Auto Supply, Inc., Winfield, Kan.	14	12	2
31. Keenan Auto Parts Co., Heavy Duty Div., Albany, Ga.	31	18	16
32. Kirkham Auto Parts Service Co., Blackfoot, Idaho	25	7	4
33. McKerlie-Millen (Ontario) Division, London	57	50	36
34. Molin Auto Parts, Buffalo, N.Y.	19	10	4
35. National Auto Supply Co., St. Louis, Mo.	23	18	11
36. National Engines & Parts Co., St. Louis, Mo.	145	10	2
37. Northern Auto Supply Co., Div. of Northern Ind., Marshfield, Wis.	29	20	11
38. Norwood Motor Parts Co., Inc., Brockton, Mass.	24	5	3
39. O.K. Auto Supply Co., Inc., Ishpeming, Mich.	17	12	5
40. O'Reilly Automotive, Inc., Springfield, Mo.	100	12	9
41. Painters Supply, Orlando, Fla.	18	3	—
42. Parker Auto Supply, Sumter, S.C.	18	3	1
43. Pro Diesel, Inc., Laval, Canada	19	2	6
44. Repco Auto Parts, Vic., Melbourne, Victoria, Australia	64	86	19
45. Republic Automotive Parts, Inc., Brentwood, Tenn.	80	30	10
46. Rodefeld Co., Inc., Richmond, Ind.	16	16	13
47. Rupp Automotive, Columbia, Mo.	26	10	6
48. Sanel Auto Parts, Inc., Concord, N.H.	27	31	3
49. Sieg Co., Davenport, Iowa	15	10	1
50. 688 Parts Service, Inc., Baton Rouge, La.	15	3	—
51. Southern Auto Supply, Inc., Bakersfield, Calif.	13	4	1
52. Standard Auto Parts, Tulsa, Ore.	13	4	3
53. Sturdevant's Inc., Wahpeton, N.D.	13	10	5
54. Taylor Parts & Supply Co., Inc., Andalusia, Ala.	29	4	8
55. Twin 'B' Delmarva, Chesapeake, Va.	29	—	—
56. U.A.P., Inc., Montreal, Canada	141	103	61
57. White Plains Motor Service, White Plains, N.Y.	21	2	1

Source: JOBBER TOPICS, Directory of Automotive Jobbers July 1989.

Shipments Of Passenger Car Tires

Year	Original Equipment	Replacement	Export	Total
1976	49,905,133	122,999,524	4,104,659	177,009,316
1977	55,667,960	129,283,293	4,600,816	189,552,114
1978	54,962,674	135,151,410	3,752,806	193,866,890
1979	48,188,000	121,922,000	3,909,000	174,019,000
1980	34,932,806	106,912,217	4,074,250	145,919,273
1981[1]	35,979,000	125,263,000	4,017,000	165,259,000
1982	33,981,000	130,539,000	2,949,000	167,469,000
1983	43,845,000	133,964,000	4,206,000	182,015,000
1984	50,993,000	144,580,000	6,064,000	201,637,000
1985	54,838,000	141,455,000	4,625,000	200,918,000
1986	54,392,000	144,267,000	4,032,000	202,691,000
1987	52,913,000	151,892,000	5,987,000	210,792,000
1988	54,131,000	155,294,000	9,365,000	218,790,000
1989	51,170,000	153,281,000	12,437,000	216,888,000

Source: Rubber Manufacturers Association. [1]Figures have been adjusted to include those manufacturers, both foreign and domestic, that do not report to RMA. 1982 and subsequent totals include Volkswagen. 1983 and subsequent totals include Renault.

Franchised New Car Dealers' Service and Parts Sales

Year	Millions of Dollars	Percent Change
1979	$23,142	13.1%
1980	22,703	−1.9%
1981	23,116	1.8%
1982	24,447	5.8%
1983	26,461	8.2%
1984	30,044	13.5%
1985	32,461	8.0%
1986	34,611	6.6%
1987	39,555	14.3%
1988	43,238	9.3%
1989	44,421	2.7%

Source: Industry Analysis Div., National Automobile Dealers Association.

Profile of the Franchised Dealer's Service and Parts Operation

	Average Dealership	All Dealers
Total Service and Parts Sales	$1,794,785	$ 44.4 Billion
Total Gross Profit as percent of Service and Parts Sales	39.4%	XX
Total Net Profit as percent of Service and Parts Sales	3.8%	XX
Total Number of Repair Orders Written	7,800	195 Million
Total Service and Parts Sales per Customer Repair Order	$ 190	XX
Total Service and Parts Sales per Warranty Repair Order	$ 140	XX
Number of Mechanics	10	236,000
Number of Service Bays (excluding body)	14	346,000
Total Parts Inventory	$ 240,000	$ 5.9 Billion
Average Customer Mechanical Labor Rate	$ 36	XX

Source: Industry Analysis Div., National Automobile Dealers Association.

State-by-State Look

State	Car Registration[1]	Truck and Bus Registration[1]	Total Registration[1]	Automotive Distributors/ Outlets[2]
Ala.	3,065,000	1,010,000	4,075,000	435
Alaska	233,000	134,000	367,000	52
Ariz.	1,993,000	792,000	2,785,000	345
Ark.	835,000	601,000	1,436,000	379
Calif.	16,799,000	4,858,000	21,657,000	2,318
Colo.	2,132,000	800,000	2,932,000	375
Conn.	2,535,000	160,000	2,695,000	315
Del.	407,000	122,000	529,000	66
D. of C.	252,000	16,000	268,000	16
Fla.	9,014,000	2,364,000	11,378,000	1,194
Ga.	3,802,000	1,583,000	5,385,000	679
Hawaii	626,000	93,000	719,000	117
Idaho	609,000	344,000	953,000	170
Ill.	6,579,000	1,512,000	8,091,000	1,297
Ind.	3,115,000	1,150,000	4,265,000	722
Iowa	1,848,000	765,000	2,613,000	540
Kan.	1,543,000	694,000	2,237,000	445
Ky.	1,887,000	954,000	2,841,000	419
La.	1,986,000	998,000	2,984,000	451
Maine	770,000	218,000	988,000	156
Md.	2,908,000	631,000	3,539,000	365
Mass.	3,292,000	499,000	3,791,000	556
Mich.	5,637,000	1,656,000	7,293,000	1,015
Minn.	2,553,000	714,000	3,267,000	448
Miss.	1,377,000	434,000	1,811,000	301
Mo.	2,753,000	1,120,000	3,873,000	714
Mont.	438,000	295,000	733,000	154
Neb.	886,000	454,000	1,340,000	265
Nev.	589,000	246,000	835,000	100
N.H.	774,000	202,000	976,000	141
N.J.	5,384,000	510,000	5,894,000	780
N.M.	773,000	474,000	1,247,000	173
N.Y.	8,861,000	1,323,000	10,184,000	1,581
N.C.	3,698,000	1,503,000	5,201,000	805
N.D.	388,000	274,000	662,000	122
Ohio	7,129,000	1,691,000	8,820,000	1,178
Okla.	1,682,000	899,000	2,581,000	411
Ore.	1,815,000	552,000	2,367,000	319
Pa.	6,354,000	1,568,000	7,922,000	1,491
R.I.	566,000	121,000	687,000	115
S.C.	1,849,000	625,000	2,474,000	344
S.D.	420,000	287,000	707,000	127
Tenn.	3,509,000	823,000	4,382,000	582
Texas	8,523,000	4,042,000	12,565,000	1,758
Utah	807,000	381,000	1,188,000	164
Vt.	347,000	126,000	473,000	81
Va.	3,637,000	1,092,000	4,729,000	566
Wash.	2,883,000	1,192,000	4,075,000	498
W. Va.	932,000	389,000	1,321,000	188
Wis.	3,290,000	753,000	4,043,000	606
Wyo.	291,000	200,000	491,000	90
TOTAL	144,375,000	44,294,000	188,669,000	26,529

Sources: [1]U.S. Federal Highway Administration. [2]JOBBER TOPICS Circulation File (1990). [3]Vehicles per wholesaling outlet obtained by dividing outlets into total registration. Final figure is average for all states. [4]Industry Analysis Div., National Automobile Dealers Association. [5]Dun & Bradstreet (1990). Figures represent dealers of new and used automobiles; pickups; trucks, tractors and trailers; and

at the Wholesaler's Market

Vehicles Per Wholesaling Outlet[3]	New Car Dealers[4]	New & Used Motor Vehicle Dealers[5]	Service Stations & Truck Stops[6]	Auto Repair Shops[7]	State
9,368	405	705	657	1,720	Ala.
7,058	35	51	86	184	Alaska
8,012	230	559	366	1,746	Ariz.
3,789	325	677	519	1,108	Ark.
9,343	1,915	3,479	3,531	14,710	Calif.
7,819	290	634	652	1,822	Colo.
8,556	385	757	757	1,595	Conn.
8,015	70	106	106	321	Del.
1,675	10	35	60	97	D. of C.
9,529	970	2,008	1,678	6,164	Fla.
7,931	665	1,162	1,227	2,839	Ga.
6,145	65	95	244	401	Hawaii
5,606	130	261	296	515	Idaho
6,238	1,225	2,258	2,017	4,887	Ill.
5,907	665	1,088	1,225	2,614	Ind.
4,839	515	870	1,176	1,392	Iowa
5,027	360	644	785	1,377	Kan.
6,780	370	637	1,168	1,377	Ky.
6,616	360	546	694	1,646	La.
6,333	200	358	294	587	Maine
9,696	375	606	861	1,892	Md.
6,818	615	1,227	1,350	3,240	Mass.
7,185	895	1,410	1,578	4,004	Mich.
7,292	550	855	1,217	1,723	Minn.
6,017	295	585	383	1,045	Miss.
5,424	595	1,144	1,325	2,699	Mo.
4,760	160	252	277	474	Mont.
5,057	260	458	673	964	Neb.
8,350	80	131	193	522	Nev.
6,922	180	310	221	622	N.H.
7,556	770	1,259	1,837	3,917	N.J.
7,208	145	309	265	740	N.M.
6,441	1,415	2,659	2,837	7,700	N.Y.
6,461	775	1,469	1,203	3,043	N.C.
5,426	140	231	295	345	N.D.
7,487	1,130	1,744	2,511	4,643	Ohio
6,280	400	801	696	1,333	Okla.
7,420	305	575	534	1,496	Ore.
5,313	1,495	2,348	2,520	5,905	Pa.
5,974	105	1,192	231	537	R.I.
7,192	350	645	634	1,549	S.C.
5,567	145	226	337	403	S.D.
7,529	455	1,087	893	1,936	Tenn.
7,147	1,455	4,096	2,261	7,778	Texas
7,244	145	294	313	798	Utah
5,840	105	207	155	314	Vt.
8,355	660	1,096	1,225	2,596	Va.
8,183	370	755	735	2,312	Wash.
7,027	245	410	553	606	W. Va.
6,672	690	968	1,471	2,077	Wis.
5,456	80	138	223	286	Wyo.
7,112	24,575	45,417	47,345	114,601	TOTAL

vans. [6]SUPER AUTOMOTIVE SERVICE circulation file (1990). Figures represent service stations and truck stops qualified for automotive repair and service work. [7]U.S. Census of Business (1987).

Franchised New Car Dealer Service and Parts

(Millions of Dollars)

Service Labor Sales	1988	1989	Percent Change
Customer Mechanical	$ 7,497	$ 7,873	5.0
Customer Body	2,892	2,894	0.1
Warranty	2,892	2,950	2.0
Sublet	1,805	1,804	−0.1
Internal	2,266	2,180	−3.8
Other	1,068	1,090	2.0
Total Service Labor	$18,419	$18,790	2.0
Parts Sales			
Customer Mechanical	$ 6,254	$ 6,767	8.2
Customer Body	2,333	2,307	−1.1
Wholesale	7,644	7,869	2.9
Counter	1,588	1,717	8.1
Warranty	3,897	4,127	5.9
Internal	2,234	2,025	−9.3
Other	869	820	−5.6
Total Parts	24,819	25,631	3.3
Total Service & Parts	$43,238	$44,421	2.7

Source: Industry Analysis Div., National Automobile Dealers Association.

The Meaning of Median Figures

Readers will notice that a number of tables in this special section make use of median figures instead of, say, average figures. Many modern business analysts believe that medians are more precise than averages—hence a growing trend toward the use of medians.

The word "median," according to the dictionary, refers to the middle. In a statistical sampling, the word median refers to that firm whose figures place it in the exact middle of the sampling. In a study of the business costs of a thousand automotive wholesalers, for example, the median wholesaler would be that firm in the middle; five hundred of the firms would have higher costs and five hundred would have lower costs—in graduated figures working away from that median or middle firm.

ASIA's Median Wholesaler: How Well He's Managed His Assets

Asset Productivity Ratios	All Firms
Average Collection Period (days)	40.3
Cash Sales—Percent of Net Sales	30.0%
Inventory Turnover	2.9
Inventory Holding Period (days)	125.9
Sales to Inventory Ratio	4.3
Gross Margin Return on Inventory	150.9

Source: 1989 Edition of *Cost of Doing Business Analysis* For Automotive Wholesalers, published by the Automotive Service Industry Association.

Key Business Ratios For ASIA's Median Wholesaler

Profit Model Ratios	All Firms
Profit Margin = Profit Before Taxes/Net Sales	2.0%
Asset Turnover = Net Sales/Total Assets	2.4
Return on Assets = Profit Before Taxes/Total Assets	4.8%
Financial Leverage = Total Assets/Net Worth	1.6
Return on Net Worth = Profit Before Taxes/Net Worth	7.9%

Source: 1989 Edition of *Cost of Doing Business Analysis* For Automotive Wholesalers, published by the Automotive Service Industry Association.

Income Statement For ASIA's Median Wholesaler

	All Firms
Typical Total Net Sales (1,000's)	$1,305.0
Merchandise Sales Growth (1988 vs. 1987)	4.8%
Forecast Merchandise Increase (1989 vs. 1988)	6.0%
Income Statement	
Net Merchandise Sales	100.0%
Merchandise Cost of Goods Sold	64.9
Gross Margin on Merchandise Sales	35.1
Operating Expenses (Non-shop):	
Total Selling Expenses	10.1%
Total Delivery Expenses	2.7
Total Store & Occupancy Expenses	6.0
Total General & Administrative Expenses	14.0
Shop Operating Expenses	32.8
Total Operating Expenses	2.3%
Operating Profit (with Shop)	0.5
Other Income	0.8
Interest Expense	0.3
Other Expenses	2.0%
Profit Before Taxes (with Shop)	0.4
Income Taxes	1.6%
Profit After Taxes (with Shop)	

The income statement summarizes the income and outgo of funds for the entire year. It reflects the ability of management to make sales, control expenses, and thereby earn profit. The income statement serves then as a report card for management's performance over the year. The level of performance depends primarily upon control of two areas: gross margin and operating expenses.

Source: 1989 Edition of *Cost of Doing Business Analysis* for Automotive Wholesalers, published by the Automotive Service Industry Association.

Balance Sheet For ASIA's Median Wholesaler

Balance Sheet

	All Firms
Assets	
Cash & Marketable Securities	5.5%
Accounts Receivable	20.2
Inventory	59.0
Other Current Assets	1.2
Total Current Assets	85.9
Fixed Assets	14.1
Total Assets	100.0%
Liabilities and Net Worth	
Accounts Payable (Trade)	16.5%
Notes Payable	5.5
Other Current Liabilities	3.4
Total Current Liabilities	25.4
Long Term Debt	12.1
Net Worth	62.5
Total Liabilities & Net Worth	100.0%

The balance sheet reflects the financial stability of the firm. As such it indicates how much money is invested in the business, where those investments are centered, how much money is owed to various creditors and the value of the business to the owners. Unlike the income statement which reflects the flow of funds through a business during an entire accounting period, the balance sheet is a picture of the position of a business at the end of the accounting period. As the name implies, the balance sheet must balance! That is, Assets = Liabilities plus Net Worth.

Source: 1989 Edition of *Cost of Doing Business Analysis* For Automotive Wholesalers, published by the Automotive Service Industry Association.

Number of Workers, by Category of Median ASIA Wholesaler

Job Classification	Average Number Employed
Executives	1.5
Outside Sales	2.0
Sales Supervisors	0.0
Inside Counter Sales	5.0
Delivery	2.5
Stockroom	1.0
Stockroom Supervisors	0.0
Store Personnel	0.0
Administrative Supervisors	0.0
Administrative Clerical	2.0
Purchasing, Inventory	0.0
Shop (Machinists & Supervisors)	1.0
Other	0.0
Total Employees	15.0

Source: 1989 Edition of *Cost of Doing Business Analysis* For Automotive Wholesalers, published by the Automotive Service Industry Association.

Executive Compensation For ASIA's Median Wholesaler

	All Firms
Highest Paid Executive Salary & Bonus	$42,100
2nd Highest Paid Executive Salary & Bonus	$32,648
2nd Highest Paid Executive as a Percent of the Highest Paid Executive	77.5%
Highest Paid Executive Salary & Bonus as Percent of Net Sales	3.2%
2nd Highest Paid Executive Salary & Bonus as Percent of Net Sales	2.5%

In controlling employee payroll, the key to success is not the absolute level of compensation, but rather the corresponding level of sales productivity. That is, how much output is being generated in relation to the number of employees producing the output. As a general rule, the higher the level of employee productivity, the more successful the firm.

Source: 1989 Edition of *Cost of Doing Business Analysis* For Automotive Wholesalers, Published by the Automotive Service Industry Association.

Productivity Measures For Staff of Median ASIA Wholesaler

	All Firms
Payroll Expense to Merchandise Sales	21.6%
Payroll per Non-Shop Employee	$20,571
Benefits as a Percent of Payroll	5.6%
Sales per Employee	$89,266
Merchandise Sales per Outside Sales Employee ($1,000's)	$970.8
Merchandise Sales per Non-Shop Employee	$97,915
Machine Shop Sales per Shop Employee	61.5%

Employees are the lifeblood of the organization. Without a properly motivated and compensated work force, few firms can produce much more than basic levels of performance in the long run. At the same time, employee compensation and fringe benefits are usually the single largest expense category on the income statement. Consequently, employees represent both a strength to the organization and an expense to be controlled.

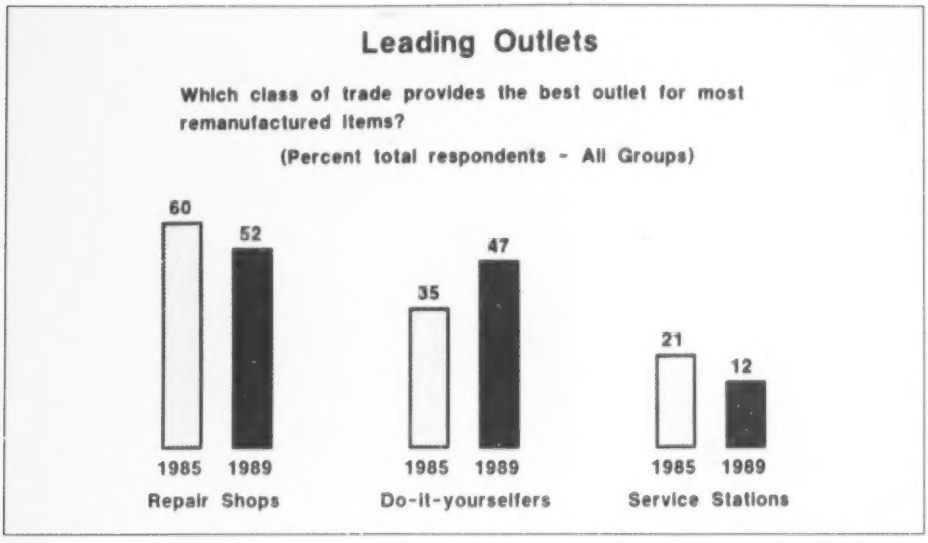
Source: 1989 Edition of *Cost of Doing Business Analysis* Automotive Wholesalers, published by the Automotive Service Industry Association.

Sales Profile of ASIA Median Warehouse Distributor

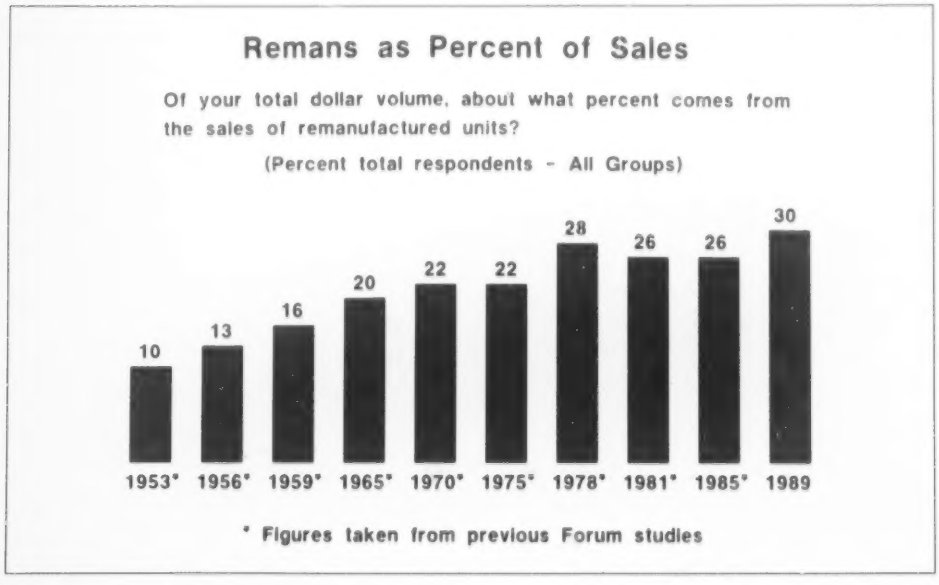
	All Firms
Number of Manufacturers Represented	90
Sales Per Manufacturers Represented ($1,000's)	$81.6
Number of Product Lines Carried	120
Sales Per Product Line Sold ($1,000's)	$51.7
Number of Part Numbers Stocked	54,196
Sales Per Part Number Stocked	$137
Number of Wholesaler Customers Served	218
Percentage of Sales to Company Owned Stores	8.0%

Every organization that buys and sells products is a merchandising organization. The sale of products represents the single largest revenue category for the firm, while the purchase of those products is the single largest cost factor. In addition, many of the other costs of doing business are in some way related to the buying, handling, or selling of the merchandise.

Source: 1989 Edition of *Cost of Doing Business Analysis* For Warehouse Distributors, published by the Automotive Service Industry Association.



Source: Forum Report titled *Demand Lifts Remans to 30 Percent of Jobber's Sales*, published October, 1989, JOBBER TOPICS. In Forum Report surveys, respondent's questionnaires are divided into three annual sales volume groups as follows: Group 1 (under $350,000), Group 2 ($350,000 to 750,000) and Group 3 ($750,000 and over).



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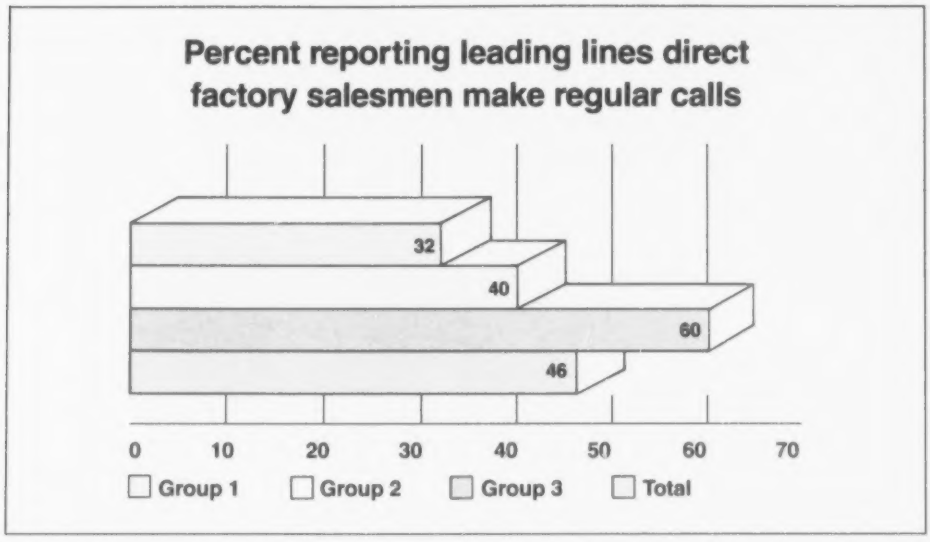
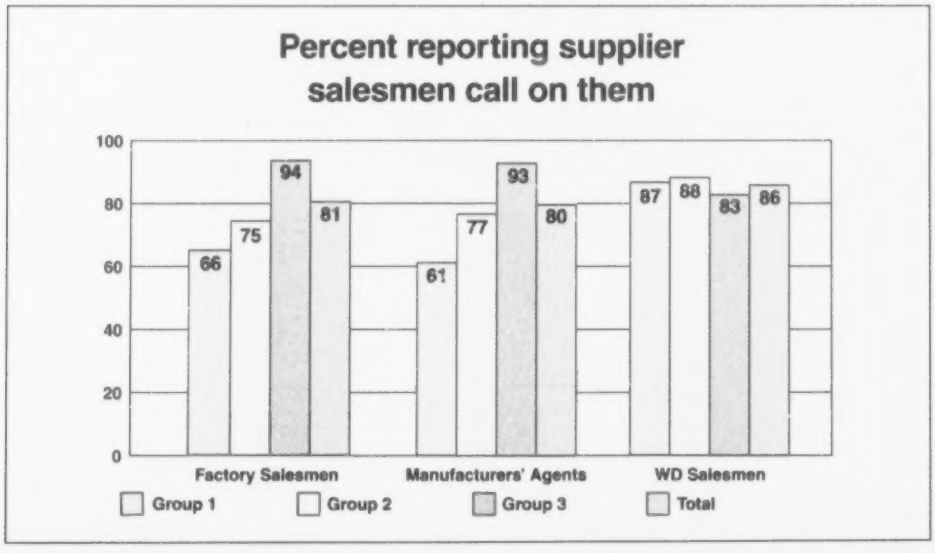
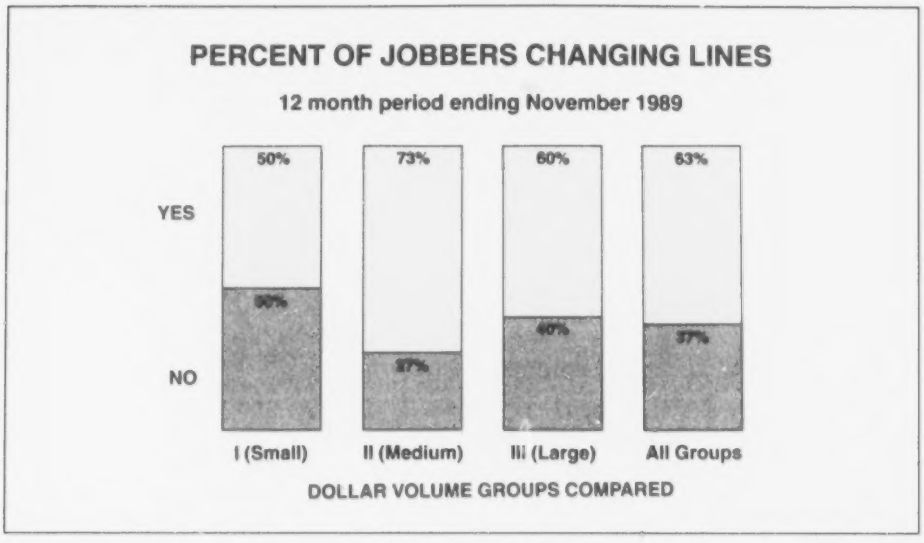


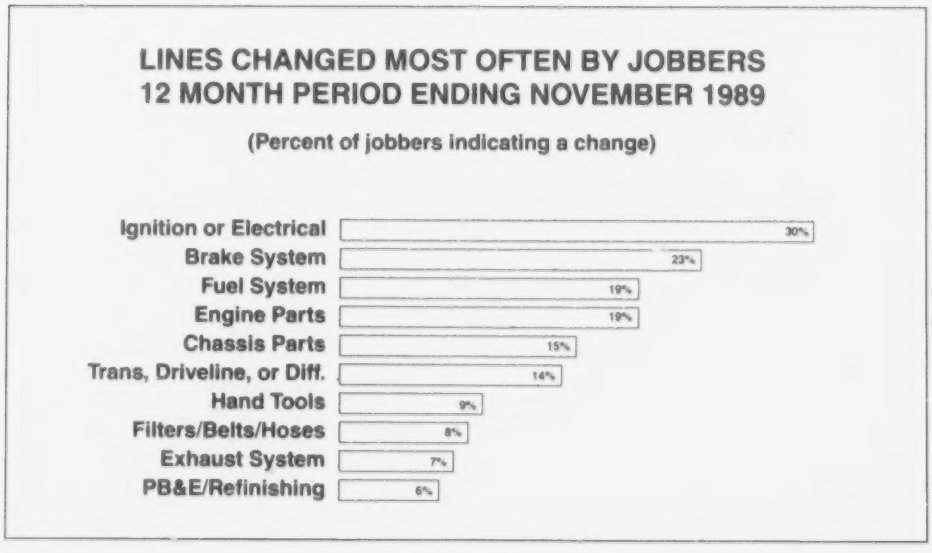
Source: Forum Report titled *How Effective are Supplier Salesmen?*, December 1989, JOBBER TOPICS. In Forum Report surveys, respondent's questionnaires are divided into three annual sales volume groups as follows: Group 1 (under $350,000), Group 2 ($350,000 to 750,000) and Group 3 ($750,000 and over).



Source: Forum Report titled *How Effective are Supplier Salesmen?*, December 1989, JOBBER TOPICS. In Forum Report surveys, respondent's questionnaires are divided into three annual sales volume groups as follows: Group 1 (under $350,000), Group 2 ($350,000 to 750,000) and Group 3 ($750,000 and over).



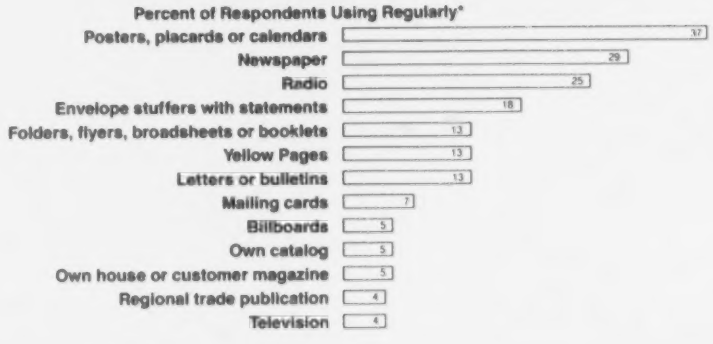
Source: Forum Report titled *Why Jobbers Change Lines*, February 1990, JOBBER TOPICS. In Forum Report surveys, respondent's questionnaires are divided into three annual sales volume groups as follows: Group 1 (under $350,000), Group 2 ($350,000 to 750,000) and Group 3 ($750,000 and over).



Source: Forum Report titled *Why Jobbers Change Lines*, February 1990, JOBBER TOPICS. In Forum Report surveys, respondent's questionnaires are divided into three annual sales volume groups as follows: Group 1 (under $350,000), Group 2 ($350,000 to 750,000) and Group 3 ($750,000 and over).

MOST POPULAR ADVERTISING MEDIA USED BY JOBBERS ON A REGULAR BASIS

(As of January 1990)



*Base : respondents who advertise

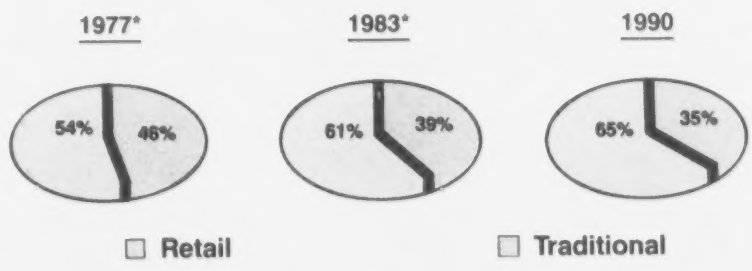
Source: Forum Report titled *Jobber Advertising,* April 1990, JOBBER TOPICS. In Forum Report surveys, respondent's questionnaires are divided into three annual sales volume groups as follows: Group 1 (under $350,000), Group 2 ($350,000 to 750,000) and Group 3 ($750,000 and over).

WHERE JOBBER ADVERTISING IS DIRECTED

RETAIL VS. TRADITIONAL TRADE

(Average Percent)

TREND



SOURCE: Previous Jobber Topics Forum Reports

Source: Forum Report titled *Jobber Advertising,* April 1990, JOBBER TOPICS. In Forum Report surveys, respondent's questionnaires are divided into three annual sales volume groups as follows: Group 1 (under $350,000), Group 2 ($350,000 to 750,000) and Group 3 ($750,000 and over).

Performance Measures For ASIA Warehouse Distributors

	Median Distributor (1989)
Sales Performance	
Dollars of Net Sales	$5,244,934
Percent Sales Change Over Prior Year	3.0%
Number of Manufacturers Represented	86
Number of Product Lines Represented	108
Return On Investment	
Profit Margin—pre-tax	2.8%
Asset Turnover	2.3%
Return on Assets—pre-tax	6.4%
Financial Leverage	2.0%
Return on Net Worth—pre-tax	12.8%
Profitability Performance	
Gross Margin (percent of sales)	24.9%
Operating Profit (percent of sales)	3.1%
Profit Before Taxes (percent of sales)	2.8%
Earnings Before Interest and Taxes to Total Assets (percent)	8.3%
Operating Expense Control	
Total Operating Expenses (percent of sales)	21.8%
Total Selling Expenses (percent of sales)	4.1%
Total Delivery & Shipping Expenses (percent of sales)	2.2%
Total Warehouse & Occupancy Expenses (percent of sales)	6.0%
Total General Administrative Expenses (percent of sales)	9.5%
Productivity Ratios	
Inventory Turnover	3.2 times
Net Sales to Inventory	4.3%
Gross Margin Return on Inventory	107.1%
Accounts Receivable Average Collection Period	44.1 days
Net Sales Volume per Employee	$197,494
Net Sales Volume per Outside Salesman	$2,097,220
Total Payroll Expense as a Percent of Net Sales	13.4%
Financial Ratios	
Current Ratio	2.0
Quick Ratio	0.7
Accounts Payable Payout Period	53.2 days
Debt to Equity	1.0

Source: 1990 Edition of the *Cost of Doing Business Analysis* for ASIA Automotive Warehouse Distributors.

Operating Expenses For ASIA's Median Wholesaler

	All Firms
Selling Expenses:	
Outside Salaries, Wages & Commission	2.5%
Inside Salaries, Wages & Commission	6.1
Travel & Entertainment	0.2
Sales Vehicle Expense	0.3
Sales Promotion & Advertising	0.8
Miscellaneous	0.2
Total Selling Expenses	10.1%
Delivery Expenses:	
Delivery Salaries & Wages	2.0%
Delivery Vehicles & Expenses	0.7
Transportation Out	0.0
Miscellaneous	0.0
Total Delivery Expenses	2.7%
Store and Occupancy Expense:	
Store Salaries & Wages	2.0%
Store Equipment & Fixtures— Depreciation & Leasing	0.1
Janitorial Supplies & Expense	0.1
Utilities	0.9
Rent	2.3
Depreciation-Building, Land & Leasehold Improvements	0.1
Repairs & Maintenance	0.4
Miscellaneous	0.1
Total Store & Occupancy Expenses	6.0%
General & Administrative Expenses:	
Executive Salaries	4.1%
General & Administrative Salaries	2.1
Data Processing Salaries & Wages	0.0
Payroll Taxes (non-shop)	1.6
Employee Benefits	1.2
Office Furniture, Fixtures & Equipment Depreciation, Leasing Repairs & Maintenance	0.1
Data Processing Equipment Depreciation, Leasing, Repairs & Maintenance	0.7
Insurance-General	1.0
Taxes-General	0.3
Telephone	0.7
All Other G&A Expenses	2.2
Total G&A Expenses	14.0%

Financial ratios are the basic scores on which managers are judged by creditors and the suppliers of capital to the business, the investors. Managers also may be investors as sole proprietors, partners, or stockholders and should know which ratios to use in evaluating their investments. The ratios covered here are the key ratios necessary to make such evaluations.

Source: 1989 Edition of *Cost of Doing Business Analysis* For Automotive Wholesalers, published by the Automotive Service Industry Association.

MEMA's 'Composite' Wholesalers

Assets	1989/88	1988/87	1987/86
Cash	6.8%	5.8%	5.6%
Accounts Receivable	19.6%	22.0%	14.3%
Inventory	50.7%	48.1%	45.4%
Total Current Assets	77.1%	75.9%	65.3%
Deferred Assets	22.9%	24.1%	34.7%
Total Assets	100.0%	100.0%	100.0%
Liabilities & Net Worth			
Current Debt	37.0%	38.8%	31.7%
Long Term Debt	10.9%	16.3%	22.6%
Net Worth	52.1%	44.9%	45.6%
Total Debt & Net Worth	100.0%	100.0%	100.0%
Profit & Loss Statement			
Net Sales	100.0%	100.0%	100.0%
Cost of Goods Sold	69.0%	69.3%	70.8%
Gross Profit	31.0%	30.7%	29.2%
Expenses	28.8%	29.0%	27.5%
Net Profit After Taxes	2.2%	1.7%	1.7%
Financial Ratios			
Collection Period—Days	30.3%	32.0	24.3
Days Payables Outstanding	42.6%	45.0	41.4
Quick Ratio	71.0%	72.0%	63.0%
Current Ratio	208.0%	195.0%	206.0%
Inventory to Working Capital	126.5%	129.6%	135.2%
Inventory to Current Assets	65.8%	63.3%	69.5%
Current Debt to Inventory	73.0%	80.8%	69.9%
Current Debt to Net Worth	71.0%	86.4%	69.6%
Total Debt to Net Worth	91.6%	122.2%	118.5%
Operating Ratios			
Gross Profit to Sales	31.0%	30.7%	29.2%
Net Profit to Sales	2.2%	1.7%	1.7%
Net Profit to Net Worth	9.9%	9.4%	8.2%
Net Profit to Working Capital	12.9%	11.4%	11.1%
Net Profit to Total Assets	5.2%	4.2%	3.7%
Efficiency Ratios—Times			
Net Sales to Net Worth	4.5	5.6	4.7
Net Sales to Working Capital	5.9	6.8	6.4
Inventory Turnover	3.2	3.6	3.4
Net Sales to Total Assets	2.4	2.5	2.2

Source: 1989 Edition of the *Automotive Distributor Trends & Financial Analysis*, published by the Motor & Equipment Manufacturers Association.

MEMA's Profile of Average WD

Assets	1989/88	1988/87	1987/86
Cash	2.8%	3.8%	4.0%
Accounts Receivable	26.0%	26.0%	26.9%
Inventory	42.0%	45.9%	46.6%
Total Current Assets	70.8%	75.7%	77.5%
Deferred Assets	29.2%	24.3%	22.5%
Total Assets	100.0%	100.0%	100.0%
Liabilities & Net Worth			
Current Debt	39.8%	46.3%	45.5%
Long Term Debt	22.4%	13.6%	16.0%
Net Worth	37.8%	40.1%	38.5%
Total Debt & Net Worth	100.0%	100.0%	100.0%
Profit & Loss Statement			
Net Sales	100.0%	100.0%	100.0%
Cost of Goods Sold	76.8%	76.1%	76.8%
Gross Profit	23.2%	23.9%	23.2%
Expenses	21.2%	22.7%	22.0%
Net Profit After Taxes	1.9%	1.2%	1.2%
Financial Ratios			
Collection Period—Days	45.2%	43.9	41.4
Days Payables Outstanding	53.2%	61.1	56.9
Quick Ratio	72.0%	64.0%	68.0%
Current Ratio	178.0%	163.0%	170.0%
Inventory Working Capital	135.3%	156.3%	146.0%
Inventory to Current Assets	59.3%	60.6%	60.1%
Current Debt to Inventory	94.6%	101.0%	97.8%
Current Debt to Net Worth	105.1%	115.4%	118.4%
Total Debt to Net Worth	159.7%	148.5%	159.8%
Operating Ratios			
Gross Profit to Sales	23.2%	23.9%	23.2%
Net Profit to Sales	1.9%	1.2%	1.2%
Net Profit to Net Worth	5.6%	6.3%	7.1%
Net Profit to Working Capital	12.5%	8.6%	8.6%
Net Profit to Total Assets	3.9%	2.5%	2.7%
Efficiency Ratios—Times			
Net Sales to Net Worth	5.6	5.4	6.2
Net Sales to Working Capital	6.8	7.4	7.4
Inventory Turnover	3.8	3.6	3.9
Net Sales to Total Assets	2.1	2.2	2.4

Source: 1989 Edition of the *Automotive Distributor Trends & Financial Analysis*, published by the Motor & Equipment Manufacturers Association.

Operating Costs of Average WD As Percent of Net Sales: AWDA

Figures Apply to 1989 Operating Experience

	Percent of Net Sales
Sales	
Gross Sales, Merchandise	135.45%
Returned Sales & Allowances, Merchandise	−29.18%
Cash Discounts Allowed	−2.40%
Trade or Volume Discounts Allowed	−3.87%
Total Reductions	−35.45%
Net Sales	100.00%
Cost of Sales	
Cost of Goods Sold	77.01%
Factory Transportation & Handling Charge	.09%
Cash Discounts Earned	−1.22%
Lifo Cost (Benefit)	0.24%
Cost Of Sales	76.12%
Gross Margin	23.88%
Operating Expenses	
Selling Expenses (These include: salaries and/or commissions for supervisors, countermen, sales trainers; salesmen travel and trade relations costs; vehicle operation and depreciation, suppliers; advertising and sales promotion; WATS or leased line to customers.)	3.75%
Delivery and Shipping Expenses (These include: salaries and/or wages for supervisors, drivers; drivers' travel costs; vehicle operation and depreciation; supplies; postage; transportation out.)	2.47%
Warehouse and Occupancy Expenses (These include: salaries and/or wages for supervisors, warehouse employees, clerical workers; supplies; heat, light, water; rent; depreciation of buildings, land improvements, leasehold improvements, and warehouse fixtures and equipment; repairs and maintenance for buildings, fixtures and equipment.)	5.88%
General and Administrative Expenses	7.33%
Total Operating Expenses	19.43%
Operating Income	4.45%
Other Income (This includes: cash discounts earned; interest received or accrued; gain on sales of assets; service bureau fees; rental income; dividends from subsidiaries; dividend income; other.)	0.89%
Other Expense (This includes: cash discounts allowed; interest paid or accrued; employees' profit sharing, employees' pension fund expenses.)	1.43%
Pretax Income	3.91%

Source: 1990 *AWDA Financial Analysis Report* of the Automotive Warehouse Distributors Association.

AWDA Figures for WD Net Profit, Turnover, Sales Per Employee

Company Size (By Dollar Vol.)	Average Net Sales Volume	Net Profit Before Taxes (Percent)	Days Sales Outstanding Accts. Rec. (Days)	Median Inventory Turns	Sales Per Employee (Dollars)
Under $4,000,000	$ 2,534,341	.10%	41.01	2.87	$164,035
$4,000,000 to $7,000,000	5,281,754	2.84	43.29	3.42	181,068
$7,000,000 to $10,000,000	8,454,012	3.30	49.42	3.48	192,224
$10,000,000 to $15,000,000	12,403,136	3.39	49.09	4.01	200,698
$15,000,000 to $20,000,000	18,736,283	3.62	47.79	4.13	209,017
Over $20,000,000	59,016,813	4.45	49.15	4.13	225,496
All Companies	$13,590,205	3.91%	46.45	3.64	$212,646

Source: 1990 *AWDA Financial Analysis Report* of the Automotive Distributors Association.

Relative Size of State and Regional Wholesaler Associations

1989 Rank	Association	1989 Members	1988 Rank
1	Texas	1,587	1
2	California	1,263	2
3	Michigan	750	9
4	Florida	742	3
5	Pennsylvania	735	4
6	New Jersey	678	6
7	Illinois	671	5
8	New England	650	7
9	Alabama	540	8
10	Ohio	527	12
11	North Carolina	525	11
12	Georgia	450	22
13	Missouri/Kansas	414	13
14	Washington	413	14
15	Kentucky	400	15
16	Louisiana	360	20
17	Chesapeake	350	17
18	Indiana	350	19
19	Virginia	347	18
20	New York	322	10
21	Oklahoma	304	16
22	Oregon	250	24
23	Minnesota	235	26
24	Iowa	225	23
25	Tennessee	219	21
26	South Carolina	210	25
27	Wisconsin	207	27
28	Rocky Mountains	178	28
29	New Mexico	150	30
30	North Dakota	125	29
31	Arizona	125	31
32	Mississippi	95	32
33	Arkansas	84	33
34	Idaho	72	35
35	Nebraska	65	34
36	West Virginia	50	36
37	Nevada	32	37
38	Montana	28	38
39	Hawaii	1	39

Source: JOBBER TOPICS.

How ASIA's Heavy Duty Distributors Measured Up in Sales, Profits, Etc.

Figures Apply to 1988

	All Firms
Typical Sales Volume ($1,000's)	$3,338,350
Sales Growth (1988 vs. 1987)	8.2%
Forecasted Sales Growth	5.6%
Net Sales By Profit Center	
Merchandise & Parts Sales	96.0
Machine Shop Labor Sales	0.9
Drive-in Shop Labor Sales	3.1
Total Net Sales	100.0%
Gross Margin By Profit Center	
Merchandise & Parts Gross Margin	32.3%
Machine Shop Labor Gross Margin	45.3%
Drive-in Shop Gross Margin	45.6%
Gross Margin from Total Net Sales	33.0%
Income Statement	
Net Sales	100.0%
Cost of Goods Sold	67.0
Gross Margin	33.0
Operating Expenses	
Non-Shop Salaries & Wages	14.9
Machine Shop Operating Expenses	0.0
Drive-in Shop Operating Expenses	0.0
Other Operating Expenses	4.3
Total Operating Expenses	29.2
Operating Profit	3.8
Other Income	0.6
Interest Expense	0.7
Other Expenses	0.0
Profit Before Taxes	2.5
Income Taxes	0.5
Profit After Taxes	2.0%

Source: 1989 Edition of *Cost of Doing Business Analysis* for ASIA Heavy Duty Distributors, published by the Automotive Service Industry Association.

Productivity of People Working For ASIA Heavy Duty Distributors

Employee Productivity	All Firms
Total Sales per Employee	$120,437
Merchandise & Parts Sales per Non-Shop Employee	$143,630
Merchandise & Parts Sales per Outside Sales Employee	$735,841
Machine Shop Sales per Machine Shop Employee	$ 29,889
Drive-in Shop Sales per Drive-in Shop Employee	$ 38,718

Executive Compensation	
Highest Paid Executive (Salary & Bonus)	$ 49,000
2nd Highest Paid Executive (Salary & Bonus)	$ 38,800
2nd Highest Paid Executive as a percent of the Highest Paid Executive	79.2%
Non-shop Salaries & Wages as a percent of Merchandise & Parts Sales	15.9%
Non-shop Salaries & Wages per Non-Shop Employee	$ 24,000

Employees By Function	
Machine Shop	2.0
Drive-in Shop	5.0
Outside Sales	4.0
Other Non-shop	6.0
Total Employees	27.0

Source: 1989 Edition of *Cost of Doing Business Analysis* for ASIA Heavy Duty Distributors, published by the Automotive Service Industry Association.

ASIA's Machine Shop Operations

The income figures below are percents of machine shop labor and parts sales.

Typical Machine Shop Sales	$78,074

Machine Shop Income Statement	
Shop Labor & Parts Sales	100.0%
Cost of Shop Sales (Parts, Shop Wages, & Outside Sublet Repairs)	60.8
Shop Gross Margin	39.2
Shop Operating Expenses*	21.6
Shop Operating Profit	17.6%

Shop Employee Productivity	
Machine Shop Sales per Shop Employee	$36,515
Number of Shop Employees	3.0

Source: 1989 Edition of *Cost of Doing Business Analysis* for Automotive Wholesalers, published by the Automotive Service Industry Association. *Shop operating expenses include shop supplies, equipment, warranty expense, selling expense allocation, delivery expense allocation, occupancy expense allocation, general and administrative expense allocation, shop interest expense and all other expenses associated with shop operations.

Financial Ratios for ASIA's Median Wholesaler

Financial Ratios	All Firms
Current Ratio	3.4
Quick Ratio	1.0
Cash to Current Liabilities	21.7%
Accounts Payable to Inventory	28.0%
Accounts Payable Payout Period (days)	35.0
Debt to Equity	0.6
EBIT to Total Assets	6.7%
Times Interest Earned	3.5

Source: 1989 Edition of *Cost of Doing Business Analysis* For Automotive Wholesalers, published by the Automotive Service Industry Association.

ASE Certified Technicians by Type of Employer

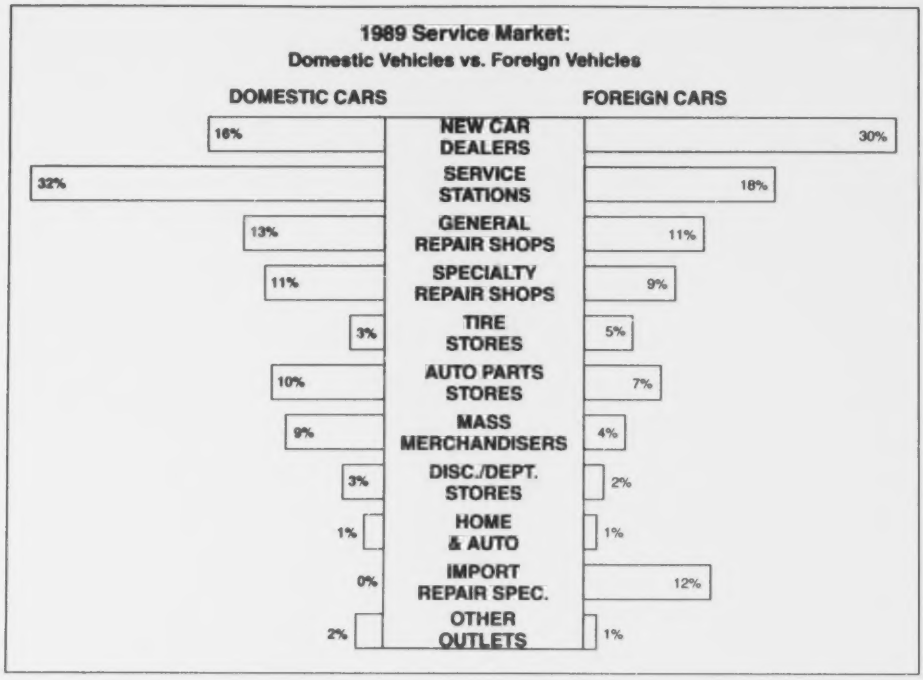
	Number of Certified Technicians	Percent of Total
Domestic Dealerships	77,597	30.97
Import Dealerships	27,482	10.97
Service Stations	20,855	8.32
Independent Garages	31,901	12.73
Specialty Shops	9,333	3.73
Tire Dealerships	24,437	9.75
Volume Retailers	5,750	2.30
Fleets (private)	10,209	4.08
Other	42,956	17.15
TOTAL	250,520	100.%

Source: The National Institute for Automotive Service Excellence. Figures represent technicians currently certified through fall of 1989 testing.

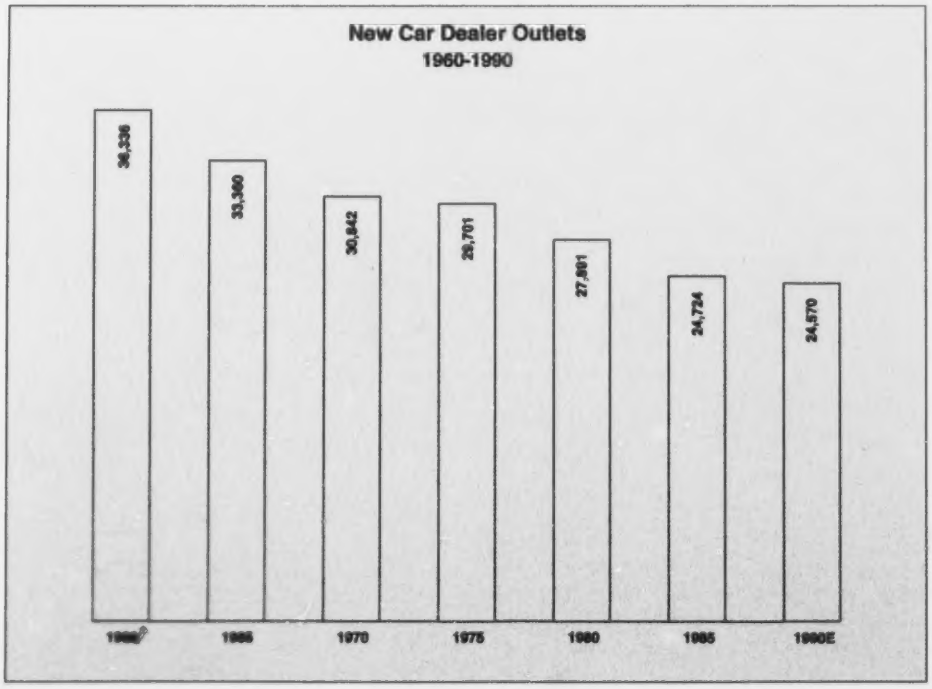
ASE Testing and Certifying of Technicians (1972-1989)

Net Total ever Registered, excluding repeaters	647,049
Total Actually Taking Tests, excluding repeaters	578,462
Total Passing Tests, including expired certifications	470,297
Total Currently Certified, excluding expired certifications (Net)	250,520
—Total Currently Certified as either Master Auto or Master Truck	62,402
—Total Currently Certified as Master Auto and Master Truck	3,022
—Total also Currently Certified in Body Repair/Painting and Refinishing	946
Number of Regular Tests Taken	3,015,055
Number of Regular Tests Passed	1,950,517
Number of Recertification Tests Passed	575,636

Source: The National Institute for Automotive Service Excellence.



Source: Motor & Equipment Manufacturers Association.



Source: Motor & Equipment Manufacturers Association.

Automotive Trade with the United States

	1989 Dec.	1989 Total Trade	1988 Dec.	1988 Total Trade	Percent Change '88/'89
Domestic Exports					
PASSENGER CARS	1,348.8	16,359.5	1,175.8	16,817.7	−2.7%
TRUCKS	577.4	7,256.3	646.9	7,112.6	2.0%
OTHER VEHICLES	38.8	614.2	49.0	606.8	1.2%
Assembled Vehicles	1,965.1	24,230.1	1,871.8	24,537.1	−1.3%
ENGINE & ENGINE PARTS	128.9	2,225.1	190.0	2,220.2	0.2%
PARTS & ACCESSORIES	492.4	7,632.7	588.0	7,781.5	−1.9%
All Motor Vehicle Parts	621.3	9,857.8	777.9	10,001.7	−1.4%
All Automotive Exports	2,586.4	34,087.9	2,649.7	34,538.8	−1.3%
Imports					
PASSENGER CARS	646.3	8,118.8	625.6	8,601.0	−5.6%
TRUCKS	166.7	2,344.4	163.6	2,586.9	−9.4%
OTHER VEHICLES	50.7	679.0	39.2	517.3	31.2%
Assembled Vehicles	863.6	11,142.2	828.5	11,705.2	−4.8%
ENGINES	100.0	1,958.6	145.1	2,042.7	−4.1%
ENGINE PARTS	33.0	843.6	61.5	1,016.1	−17.0%
PARTS & ACCESSORIES	761.1	12,069.1	602.3	12,769.4	−5.5%
All Motor Vehicle Parts	894.1	14,871.4	808.9	15,828.2	−6.0%
All Automotive Imports	1,757.7	26,013.6	1,637.4	27,533.4	−5.5%
Balances					
PASSENGER CARS	702.5	8,240.7	550.2	8,216.7	0.3%
TRUCKS	410.8	4,911.9	483.3	4,525.7	8.5%
OTHER VEHICLES	(11.8)	(64.7)	9.8	89.4	−172.4%
Assembled Vehicles	1,101.4	13,087.9	1,043.2	12,831.9	2.0%
ENGINES	(4.1)	(577.2)	(16.6)	(838.6)	−31.2%
PARTS & ACCESSORIES	(268.7)	(4,436.4)	(14.3)	(4,987.9)	−11.1%
All Motor Vehicle Parts	(272.8)	(5,013.6)	(30.9)	(5,826.5)	−14.0%
All Automotive Products	828.7	8,074.3	1,012.3	7,005.4	15.3%

Source: Statistics Canada.

Automotive Wholesaler Failures

Year	Number	Liabilities	Year	Number	Liabilities
1946	1	$ 47,000	1968	72	$8,411,000
1947	17	456,000	1969	49	7,383,000
1948	26	892,000	1970	61	4,617,000
1949	44	1,150,000	1971	59	8,478,000
1950	55	1,083,000	1972	46	4,452,000
1951	23	330,000	1973	55	10,295,000
1952	22	529,000	1974	60	7,024,000
1953	28	1,010,000	1975	65	12,122,000
1954	39	1,015,000	1976	57	30,272,000
1955	53	1,523,000	1977	48	27,849,000
1956	41	2,699,000	1978	43	6,270,000
1957	45	1,470,000	1979	48	51,445,000
1958	42	1,275,000	1980	109	47,730,000
1959	50	1,744,000	1981	112	29,682,000
1960	77	4,191,000	1982	138	74,386,000
1961	89	3,744,000	1983	183	59,151,000
1962	80	4,696,000	1984	241	33,319,000
1963	74	3,917,000	1985	272	64,710,000
1964	94	3,452,000	1986	303	119,104,460
1965	84	4,488,000	1987	245	194,130,445
1966	98	5,632,000	1988	246	189,024,713
1967	91	9,211,000	1989	201[1]	78,278,578[1]

Source: Economic Analysis Dept., Dun & Bradstreet Corp. [1]Preliminary figures.

Canadian Wholesalers' Business Conditions Survey

Division	Number of Stores Dec. 89	Sales Dec. 1989	Avg. Sales Per Store Dec.	Percent Change Sales Dec. 89/ Dec. 88	Sales Y.T.D. 1988	Sales Y.T.D. 1989	Avg. Sales Per Store Y.T.D. 1988	Percent Change Sales Y.T.D. 89/88
British Columbia	76	7,601,304	96,219	8.9%	99,207,284	110,098,108	1,393,647	11.0%
Alberta	25	2,658,483	106,339	8.0%	33,539,045	36,101,977	1,444,079	7.7%
Saskatchewan	17	1,652,408	97,200	10.8%	19,744,590	21,863,163	1,286,068	10.7%
Manitoba	5	218,125	36,354	37.8%	2,295,591	2,856,554	476,092	24.4%
Ontario—1 to 2 stores	27	2,673,744	86,250	0.6%	36,827,759	35,533,574	1,146,244	−3.5%
Ontario—3 or more stores	82	6,501,044	74,725	−1.9%	89,831,988	92,781,230	1,066,451	3.3%
Ontario—Total	109	9,174,788	84,172	−1.2%	126,659,747	128,314,804	1,177,200	1.3%
Quebec—1 to 2 stores	15	2,751,916	183,461	1.1%	35,366,153	36,967,091	2,464,473	4.5%
Quebec—3 or more stores	101	14,837,335	146,904	9.9%	146,554,486	164,079,533	1,624,550	12.0%
Quebec—Total	116	17,589,251	151,631	8.4%	181,920,639	201,046,624	1,733,161	10.5%
Atlantic	35	3,255,762	93,022	0.7%	43,064,492	44,784,049	1,279,544	4.0%
Total	383	42,150,121	110,053	5.8%	506,431,388	545,065,279	1,423,147	7.6%
1 to 2 stores—Independents	92	9,423,972	102,434	−5.0%	121,757,557	128,047,389	1,391,819	5.2%
3 or more stores—Chains	291	32,726,149	112,461	9.4%	384,663,831	417,017,890	1,433,051	8.4%

Year end results of the 1989 AIA Wholesalers' Business Conditions survey indicate a good year for Wholesalers doing business in Canada. Year-to-date performance of Canadian Wholesalers increased 7.6 percent over levels reached last year, with 383 Wholesalers reporting a total of $545,065,279 in sales.

On a provincial basis, all Wholesalers, with the exception of Ontario-based independents, posted increases in sales during 1989. Wholesalers in Manitoba showed the greatest increase in sales at 24.4 percent over the same period last year while sales by Ontario independent Wholesalers declined 3.5 percent (on sales of $2,856,554, and $35,533,574 respectively).

In terms of average sales per store, independent Wholesalers working in Quebec performed the best in 1989 with sales of $2,464,473 per store, followed by Quebec chain stores ($1,624,550), Alberta Wholesalers ($1,444,079), British Columbia Wholesalers ($1,393,647), Atlantic region Wholesalers ($1,279,544), Saskatchewan Wholesalers ($1,286,068), independent Wholesalers in Ontario ($1,146,244), Ontario chain stores ($1,066,451), and Wholesalers selling in Manitoba ($476,092).

Source: Statistics Canada.

What It Costs to Own, Operate Average Car in 1989

Figures Based on Composite Costs*
Cost Per Mile

Cost Item	1989
Gasoline and oil	5.4 cents
Tires	.9 cents
Maintenance	2.9 cents
Fixed Costs Per Year	
Comprehensive insurance ($100 deductible)	$ 102.00
Collision insurance ($250 deductible)	$ 237.00
Property damage and liability ($100/300/50M)	$ 318.00
License, registration, taxes	$ 156.00
Depreciation	$2,242.00
Finance charge (20% down, 11.0% for 4 years)	$ 638.00
Total Cost Per Mile	33.0 cents
Total Cost Per Year	$4,954.00

Source: American Automobile Association. The AAA study used cars equipped with standard and optional accessories, including automatic transmission, air conditioning, power steering, power disc brakes, AM/FM stereo, cruise control, tilt steering wheel, tinted glass and rear-window defogger. Gasoline costs were based on a $1.144 per-gallon charge for regular unleaded fuel. Insurance figures were based on personal use of vehicles—cars driven less than 10 miles to or from work, with no young drivers. Normal depreciation costs were based on the car's trade-in value at the end of four years or at 60,000 miles. For cars driven 10,000 miles per year, depreciation was based on six years or 60,000 miles. *The costs for operating a Ford Escort LX, Ford Taurus L, and Chevrolet Caprice were averaged to arrive at these figures.

Latest Financial Rankings of

Automobile Parts—Miscellaneous

Figures Apply to 1988 With Certain Exceptions, As Noted

Rank	Revenues ($ Mill.) Company	'88 Amt.	Rank	Net Income ($ Mill.) Company	'88 Amt.
1	Echlin, Inc.	1294.30	1	Echlin, Inc.	62.07
2	Clark Equipment Co.	1278.28	2	SPX Corp.	44.90
3	Federal-Mogul Corp.	1189.57	3	Clark Equipment Co.	44.13
4	SPX Corp.	877.73	4	Federal-Mogul Corp.	43.42
5	Harley-Davidson, Inc.	757.38	5	Danaher Corp.	40.03
6	Intermark, Inc.	720.66	6	Standard Products Co.	34.06
7	Danaher Corp.	715.69	7	Harley-Davidson, Inc.	27.16
8	Standard Products Co.	508.34	8	Lamson & Sessions Co.	26.90
9	Modine Manufacturing Co.	423.86	9	Modine Manufacturing Co.	26.21
10	Standard Motor Products, Inc.	398.40	10	Superior Industries Int'l. Inc.	13.14
11	Lamson & Sessions Co.	389.37	11	Cascade Corp.	11.67
12	Allen Group, Inc.	344.42	12	Simpson Industries, Inc.	10.53
13	Douglas & Lomason Co.	325.50	13	Kysor Industrial Corp.	10.40
14	Envirosource, Inc.	314.29	14	Standard Motor Products, Inc.	9.26
15	Wynn's International, Inc.	299.31	15	Twin Disc, Inc.	8.31
16	Kysor Industrial Corp.	239.01	16	Myers Industries, Inc.	8.07
17	Trico Products Corp.	232.73	17	Redlaw Industries, Inc.	4.77
18	Superior Industries Int'l. Inc.	200.15	18	Wynn's International, Inc.	4.42
19	Myers Industries, Inc.	183.81	19	Howell Industries, Inc.	3.97
20	Simpson Industries, Inc.	179.13	20	Trico Products Corp.	3.37
21	Twin Disc, Inc.	162.40	21	Allen Group, Inc.	3.35
22	Larizza Industries, Inc.	149.02	22	Larizza Industries, Inc.	2.71
23	Cascade Corp.	140.17	23	Champion Parts, Inc.	1.52
24	Champion Parts, Inc.	129.48	24	Hastings Manufacturing Co.	0.51
25	Raytech Corp.	129.36	25	Intermark, Inc.	0.22
26	Arrow Automotive	106.59	26	Republic Automotive Parts, Inc.	d0.20
27	Republic Automotive Parts, Inc.	84.98	27	Arrow Automotive	d0.72
28	Redlaw Industries, Inc.	72.60	28	Douglas & Lomason Co.	d4.62
29	Hastings Manufacturing Co.	66.50	29	Envirosource, Inc.	d16.17
30	Howell Industries, Inc.	52.95	30	Raytech Corp.	d66.33

Automobile Parts—Major

Rank	Revenues ($ Mill.) Company	'89 Amt.	Rank	Net Income ($ Mill.) Company	'89 Amt.
1	Dana Corp.	5137.10	1	Eaton Corp.	209.70
2	Eaton Corp.	3671.00	2	Genuine Parts Co.	199.49
3	Cummins Engine Co.	3510.83	3	Dana Corp.	132.13
4	Genuine Parts Co.	3161.20	4	Timken Co.	55.35
5	Trinova Corp.	1942.28	5	Eagle-Picher Industries	53.81
6	Arvin Industries, Inc.	1540.52	6	Trinova Corp.	33.42
7	Timken Co.	1532.96	7	Arvin Industries, Inc.	19.67
8	Smith (A.O.) Corp.	976.26	8	Barnes Group, Inc.	12.37
9	Eagle-Picher Industries	729.92	9	Defiance, Inc.	2.55
10	Barnes Group, Inc.	511.22	10	Walbro Corp.	0.13
11	Acklands Ltd.	480.03[1]	11	Smith (A.O.) Corp.	d4.97
12	Walbro Corp.	135.72	12	Cummins Engine Co.	d6.11
13	Mr. Gasket Co.	119.25[1]	13	Mr. Gasket Co.	d14.69[1]
14	Defiance, Inc.	64.04	14	Acklands Ltd.	d15.48[1]

Publicly-Owned Automotive Firms

Automobile Parts—Miscellaneous

Figures Apply to 1988 With Certain Exceptions, As Noted

Operating Profit Margin (%)

Rank	Company	'88 Amt.
1	Danaher Corp.	14.77
2	Cascade Corp.	13.34
3	Superior Industries Int'l. Inc.	11.15
4	Standard Products Co.	11.03
5	Howell Industries, Inc.	10.70
6	Simpson Industries, Inc.	10.45
7	Modine Manufacturing Co.	10.29
8	Lamson & Sessions Co.	10.27
9	Envirosource, Inc.	9.60
10	SPX Corp.	9.54
11	Myers Industries, Inc.	9.51
12	Harley-Davidson, Inc.	8.75
13	Federal-Mogul Corp.	8.66
14	Kysor Industrial Corp.	8.61
15	Larizza Industries, Inc.	8.01
16	Echlin, Inc.	7.39
17	Twin Disc, Inc.	7.28
18	Wynn's International, Inc.	5.99
19	Champion Parts, Inc.	5.81
20	Clark Equipment Co.	5.78
21	Intermark, Inc.	5.52
22	Standard Motor Products, Inc.	5.32
23	Allen Group, Inc.	5.28
24	Hastings Manufacturing Co.	3.73
25	Redlaw Industries, Inc.	2.58
26	Republic Automotive Parts, Inc.	1.23
27	Arrow Automotive	0.33
28	Douglas & Lomason Co.	d1.43
29	Raytech Corp.	d1.79
30	Trico Products Corp.	d6.56

Return On Capital (%)

Rank	Company	'88 Amt.
1	Howell Industries, Inc.	21.95
2	Lamson & Sessions Co.	20.18
3	Standard Products Co.	19.68
4	Cascade Corp.	16.48
5	Modine Manufacturing Co.	12.07
6	Superior Industries Int'l. Inc.	11.51
7	Redlaw Industries, Inc.	11.21
8	Simpson Industries, Inc.	11.21
9	Harley-Davidson, Inc.	10.39
10	Danaher Corp.	9.96
11	Twin Disc, Inc.	9.91
12	Kysor Industrial Corp.	9.64
13	Myers Industries, Inc.	9.51
14	Federal-Mogul Corp.	8.16
15	Echlin, Inc.	7.91
16	SPX Corp.	7.78
17	Clark Equipment Co.	7.49
18	Standard Motor Products, Inc.	4.24
19	Larizza Industries, Inc.	3.52
20	Trico Products Corp.	3.44
21	Wynn's International, Inc.	3.43
22	Champion Parts, Inc.	2.51
23	Allen Group, Inc.	1.74
24	Hastings Manufacturing Co.	1.65
25	Intermark, Inc.	0.06
26	Republic Automotive Parts, Inc.	d0.55
27	Arrow Automotive	d1.57
28	Douglas & Lomason Co.	d4.65
29	Envirosource, Inc.	d9.72
30	Raytech Corp.	d262.04

Automobile Parts—Major

Operating Profit Margin (%)

Rank	Company	'89 Amt.
1	Eaton Corp.	10.23
2	Genuine Parts Co.	10.18
3	Dana Corp.	9.53
4	Defiance, Inc.	9.41
5	Timken Co.	8.16
6	Barnes Group, Inc.	6.65
7	Mr. Gasket Co.	5.99[1]
8	Trinova Corp.	5.52
9	Eagle-Picher Industries	5.49
10	Walbro Corp.	5.17
11	Arvin Industries, Inc.	5.10
12	Acklands Ltd.	2.11[1]
13	Cummins Engine Co.	1.57
14	Smith (A.O.) Corp.	1.42

Return On Capital (%)

Rank	Company	'89 Amt.
1	Genuine Parts Co.	19.27
2	Eaton Corp.	9.76
3	Defiance, Inc.	7.89
4	Barnes Group, Inc.	6.18
5	Timken Co.	4.54
6	Dana Corp.	4.53
7	Trinova Corp.	3.53
8	Arvin Industries, Inc.	2.73
9	Walbro Corp.	0.14
10	Cummins Engine Co.	d0.53
11	Smith (A.O.) Corp.	d1.13
12	Mr. Gasket Co.	d13.06[1]
13	Acklands Ltd.	d16.83[1]
14	Eagle-Picher Industries	d47.72

Note: Figures preceded by the letter d denote deficit. [1]Figures apply to 1988.
Source: Moody's Industry Review, published by Moody's Investors Service.

Scrappage of Motor Vehicles

(During One-Year Periods Ending June 30)

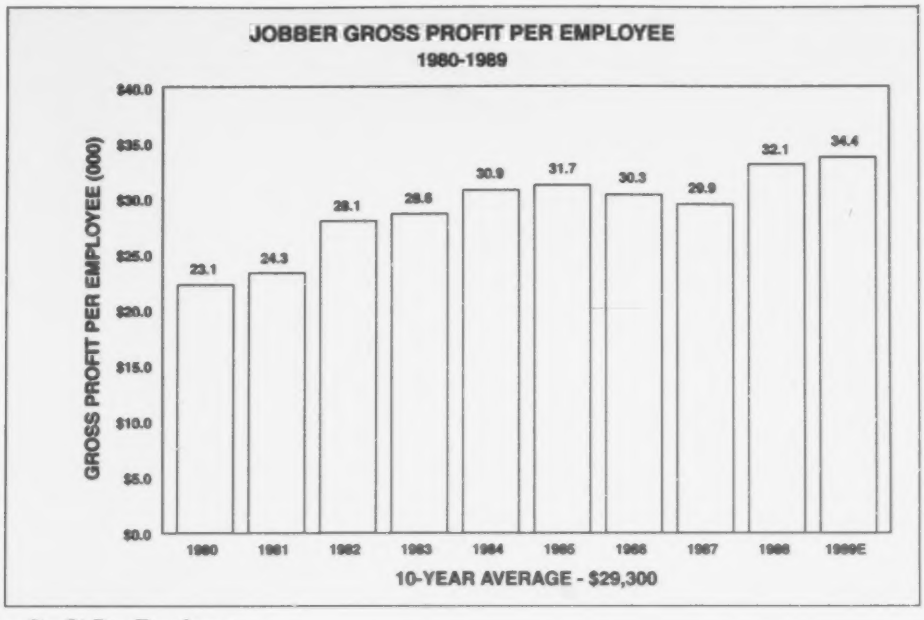
	Passenger Cars	Trucks	Cars & Trucks
July 1, 1946-June 30, 1947	478,048	(36,328)	441,720
July 1, 1947-June 30, 1948	855,517	307,660	1,163,177
July 1, 1948-June 30, 1949	1,220,041	484,245	1,704,286
July 1, 1949-June 30, 1950	2,313,813	517,054	2,830,867
July 1, 1950-June 30, 1951	3,713,417	660,008	4,373,425
July 1, 1951-June 30, 1952	3,137,989	531,835	3,669,824
July 1, 1952-June 30, 1953	2,465,936	615,932	3,081,868
July 1, 1953-June 30, 1954	3,491,000	780,513	4,271,513
July 1, 1954-June 30, 1955	3,247,436	467,659	3,715,095
July 1, 1955-June 30, 1956	4,312,759	596,257	4,909,016
July 1, 1956-June 30, 1957	4,309,153	630,303	4,939,456
July 1, 1957-June 30, 1958	4,221,607	502,245	4,723,852
July 1, 1958-June 30, 1959	2,981,641	372,085	3,353,726
July 1, 1959-June 30, 1960	4,348,719	690,568	5,039,287
July 1, 1960-June 30, 1961	4,294,118	646,791	4,940,909
July 1, 1961-June 30, 1962	4,360,774	575,903	4,936,677
July 1, 1962-June 30, 1963	4,741,017	720,039	5,461,056
July 1, 1963-June 30, 1964	5,319,286	779,870	6,099,156
July 1, 1964-June 30, 1965	5,704,373	735,975	6,440,348
July 1, 1965-June 30, 1966	6,173,512	1,073,593	7,247,105
July 1, 1966-June 30, 1967	6,984,214	946,649	7,930,863
July 1, 1967-June 30, 1968	6,200,017	860,542	7,060,559
July 1, 1968-June 30, 1969	6,348,488	966,003	7,314,491
July 1, 1969-June 30, 1970	7,460,984	837,173	8,298,157
July 1, 1970-June 30, 1971	6,021,041	1,043,877	7,064,918
July 1, 1971-June 30, 1972	7,058,029	1,048,031	8,106,060
July 1, 1972-June 30, 1973	7,987,384	1,207,536	9,194,920
July 1, 1973-June 30, 1974	7,193,679	1,047,207	8,240,886
July 1, 1974-June 30, 1975	5,668,708	907,699	6,576,407
July 1, 1975-June 30, 1976	6,828,903	1,097,457	7,926,360
July 1, 1976-June 30, 1977	8,233,925	1,667,653	9,901,578
July 1, 1977-June 30, 1978	7,907,075	1,426,294	9,333,369
July 1, 1978-June 30, 1979	9,312,274	1,916,142	11,228,416
July 1, 1979-June 30, 1980	8,404,993	1,731,670	10,136,663
July 1, 1980-June 30, 1981	7,542,480	1,518,546	9,061,026
July 1, 1981-June 30, 1982	6,921,273	1,458,795	8,380,068
July 1, 1982-June 30, 1983	6,242,544	1,490,971	7,733,515
July 1, 1983-June 30, 1984	6,674,928	1,601,889	8,276,817
July 1, 1984-June 30, 1985	7,728,594	2,100,120	9,828,714
July 1, 1985-June 30, 1986	8,442,465	2,309,090	10,751,555
July 1, 1986-June 30, 1987	8,103,356	2,363,980	10,467,336
July 1, 1987-June 30, 1988	8,754,185	2,250,532	11,004,717
July 1, 1988-June 30, 1989	8,981,300	2,188,850	11,170,150

Source: R. L. Polk & Co., Motor Statistical Division. Note: Adjustments for the absence of Oklahoma and other states have been made where applicable.

International Show Stats, by Years

Year	Place	Exhibitors	Booths	Net Sq. Ft. (Booth Space)	Attendance Total
1933	Chicago	268	562	62,324	10,781
1934	Cleveland	336	798	72,261	13,348
1935	Atlantic City	350	850	92,400	12,761
1936	Chicago	357	915	98,632	13,476
1937	Chicago	380	1,012	110,095	13,045
1938	Chicago	355	947	103,412	15,526
1939	Chicago	351	961	108,413	13,366
1940	Chicago	352	969	117,331	12,925
1946	Atlantic City	430	1,169	126,888	13,712
1947	Chicago	486	1,327	171,978	19,888
1948	Chicago	520	1,444	178,510	19,534
1950	Chicago	522	1,385	172,463	17,067
1952	Atlantic City	460	1,275	143,148	14,049
1953[2]	Chicago	289	440	44,000	4,288
1954[3]	Chicago	478	984	111,978	12,880
1959	Chicago	459	1,004	118,404	21,614
1960	New York	487	1,143	119,066	34,087
1961	Los Angeles	511	1,157	—	44,309[4]
1962	Chicago	504	1,275	146,926	29,090
1963	Philadelphia	518	1,347	138,844	22,975
1964	San Francisco	579	1,415	—	53,165[4]
1965	Chicago	542	1,422	148,980	18,177
1966	New York	505	1,139	116,887	17,640
1967	Chicago	548	1,419	146,050	17,379
1968	Las Vegas	560	1,488	—	19,512
1969	Chicago	516	1,403	145,220	18,449
1970	Las Vegas	576	1,514	136,780	21,157
1971	Chicago	496	1,407	140,700	18,989
1972	Chicago	526	1,444	158,000	20,226
1973	Las Vegas	559	1,579	157,900	25,190
1974	Chicago	510	1,523	157,450	17,219
1975	Chicago	542	1,523	157,550	20,824
1976	San Francisco	560	1,525	152,500	21,795
1977	Chicago	579	1,643	165,200	20,958
1978	Chicago	646	[5]	193,650	23,877
1979	Las Vegas	746	2,016	201,600	28,237
1980	Chicago	684	[5]	201,880	23,156
1981	Chicago	659	[5]	191,000	23,765
1982	Las Vegas	756	2,035	203,500	27,480
1983	Chicago	639	1,921	192,130	30,572
1984	Chicago	705	[5]	201,950	32,822[6]
1985	Las Vegas	791	2,215	221,500	30,555
1986	Chicago	728	[5]	221,300	35,428
1987	Atlanta	801	[5]	233,050	25,329
1988	Las Vegas	761	2,303	230,300	30,761
1989	Chicago	684	[5]	205,750	29,733
1990	Las Vegas	700	1,834	183,400	30,125

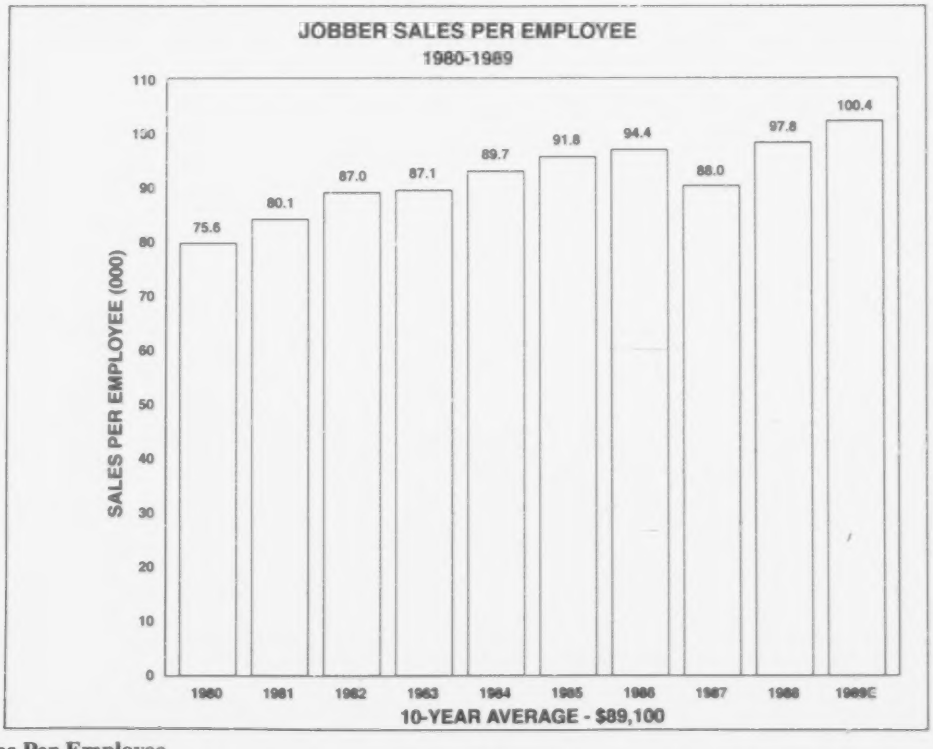
Sources: Hall-Erickson, Inc. and JOBBER TOPICS. [1]The exhibit is commonly called the Big "I" Show when staged in Chicago, but International Automotive Aftermarket Show when staged in Las Vegas or other western sites. When held in Las Vegas, the show is co-sponsored by ASIA and MEMA, presented by PAS. [2]Indicates booth conference only. [3]Indicates trade show plus booth conference. [4]Attendance figures for 1961 and 1964 are "turnstyle" counts, not an actual badge count. For years 1962 through 1983 the figure is a badge count. [5]Show officials discontinued reporting the number of show booths for the years indicated. [6]Attendance figure based on total registrations, not a badge count.



Jobber Gross Profit Per Employee

More jobbers are regaining control of their businesses by selectively increasing prices despite the risk of losing some unprofitable business. However, increases in gross profit dollars are barely keeping pace with parts price increases. Unit sales are up but gross dollars continue to lag.

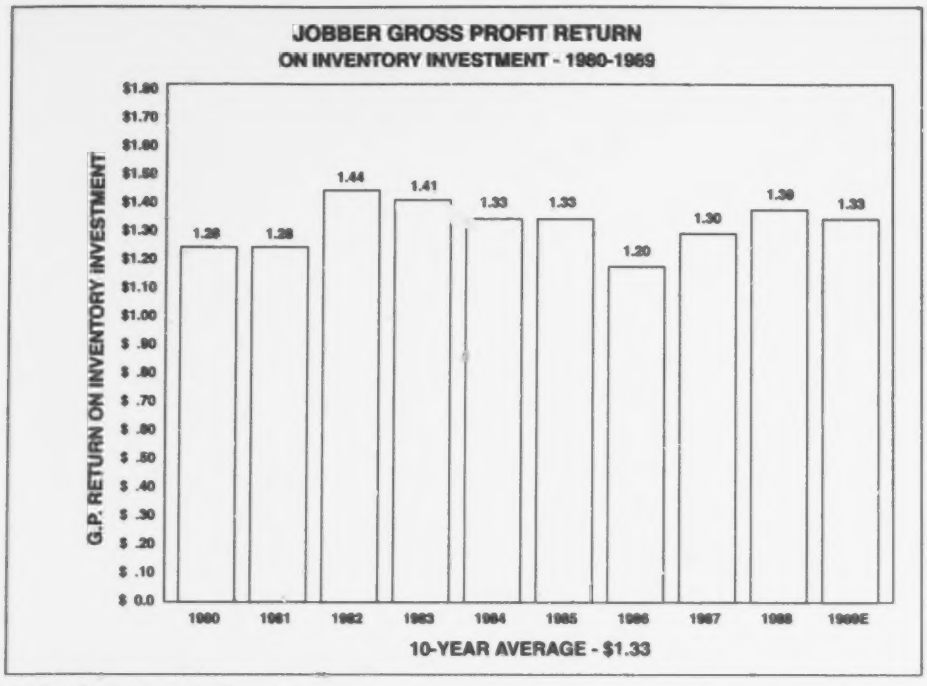
Source: Distributors Institute, Inc.



Jobber Sales Per Employee

Sales per employee are roughly keeping pace with parts price increases. Service demands, particularly by low volume customers, have not eased putting more pressure on management to maintain pricing at profitable levels.

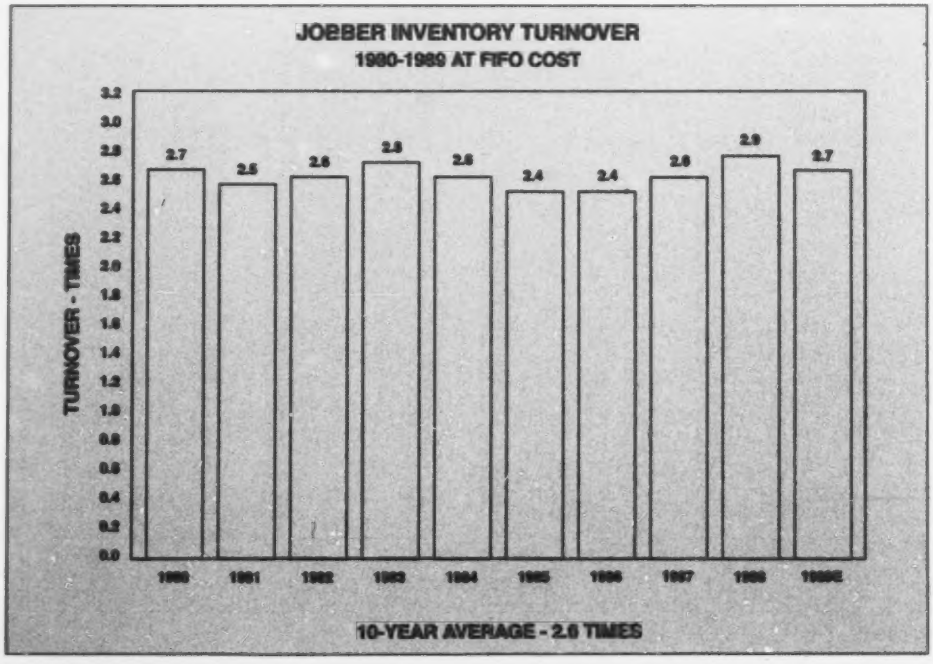
Source: Distributors Institute, Inc.



Jobber Gross Profit Return On Inventory

The 1988 ROII improved through a combination of slight increases in turnover and gross profits. In 1989, growing inventory investments absorbed slight increases in gross profits. Note 1989 ROII of $1.33 is the average ROII for the past 10 years.

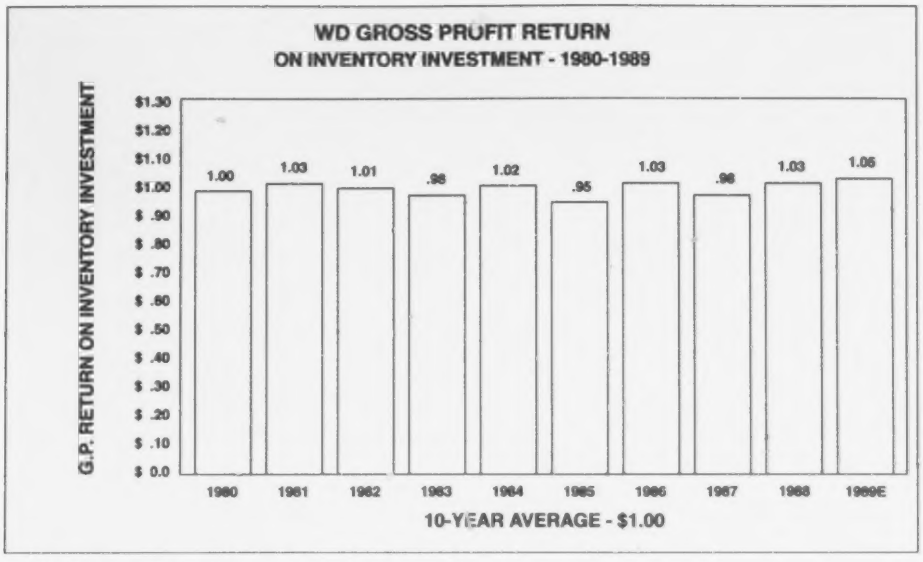
Source: Distributors Institute, Inc.



Jobber Inventory Turnover

Turnover has not reached the 3.0X level in the last 10 years, another indication of the problems created by parts proliferation despite the additional control made possible by computerization.

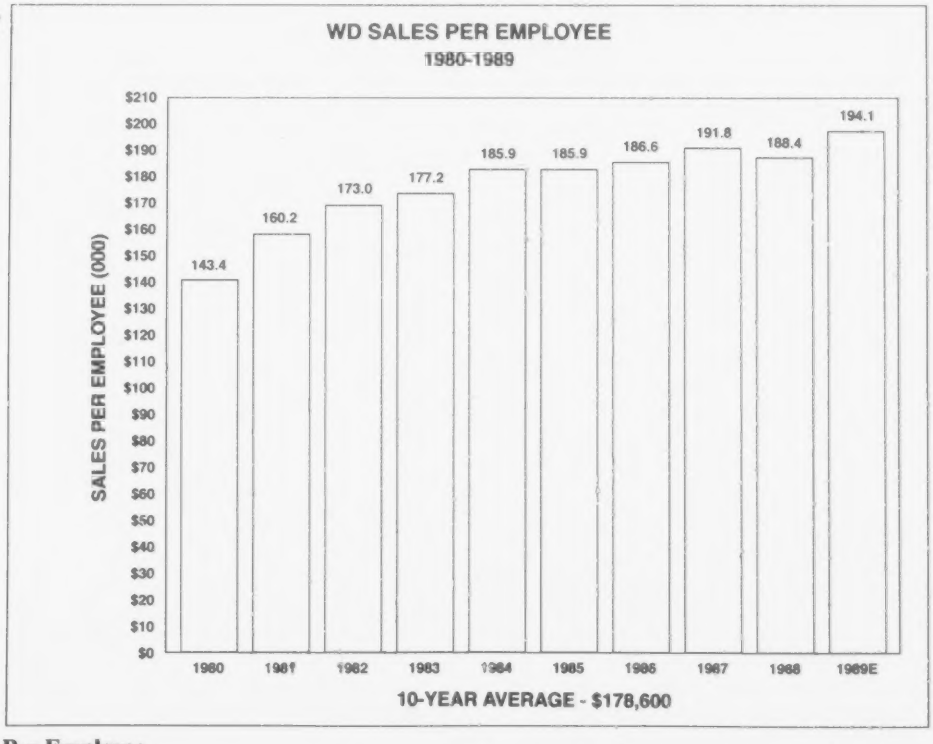
Source: Distributors Institute, Inc.



WD Gross Profit Return On Inventory

The average WD's Gross Profit Return on Inventory Investment since 1980 was $1.00. Between 1975 and 1979 the average GPROI was $1.19. The $1.05 estimate for 1989 is below the level necessary to meet increasing costs and provide capital for growth. WDs, like jobbers, are struggling to recapture pricing initiatives.

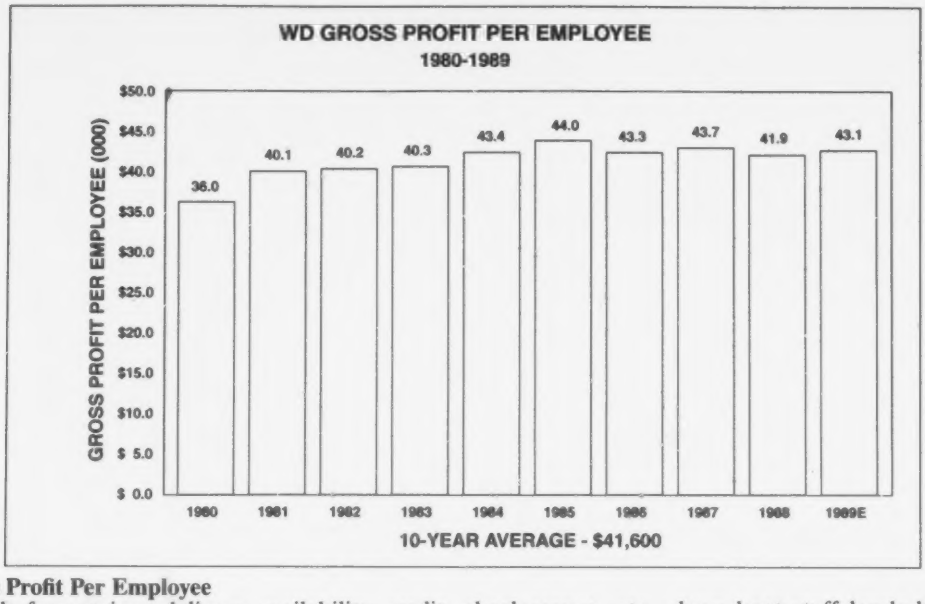
Source: Distributors Institute, Inc.



WD Sales Per Employee

As another very rough measurement of profitability, consider each employee in 1980 generated $36,000 in gross profit or 25 percent on $143,000 sales. In 1980, sales grew to $194,000 per employee while gross profits were $43,000 or just 22 percent. Increasing unit sales, decreasing gross profits, and very costly service expectations are driving basic changes in the way a typical WD will do business in the future.

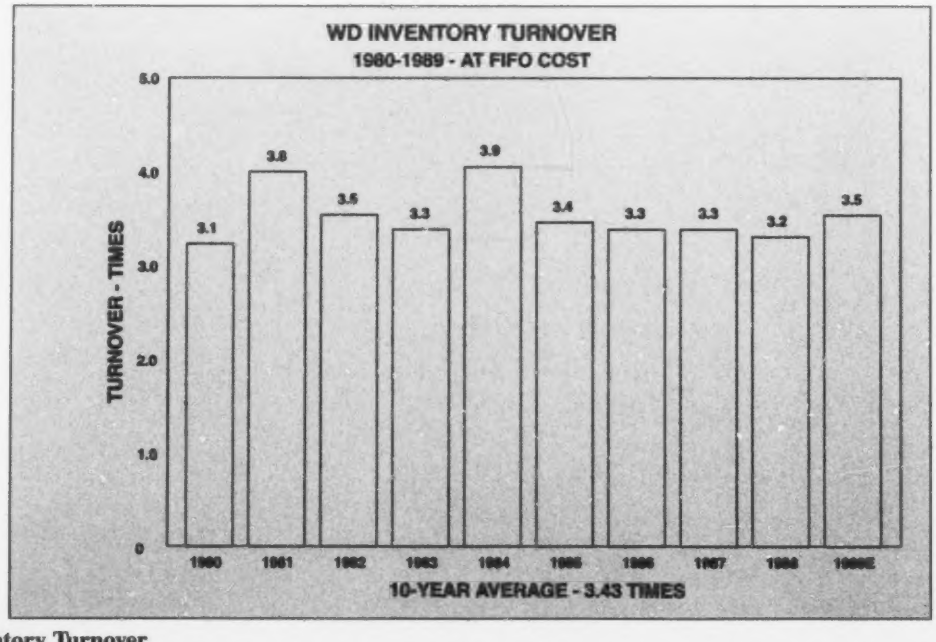
Source: Distributors Institute, Inc.



WD Gross Profit Per Employee

Demands for service—delivery, availability, credit, obsolescence, etc.—have kept staff levels higher than decreasing gross profits justify. Compounding the WD problem are increases in units handled. Unprofitable, low volume customers are being screened out in order to maintain service levels for the more profitable customers.

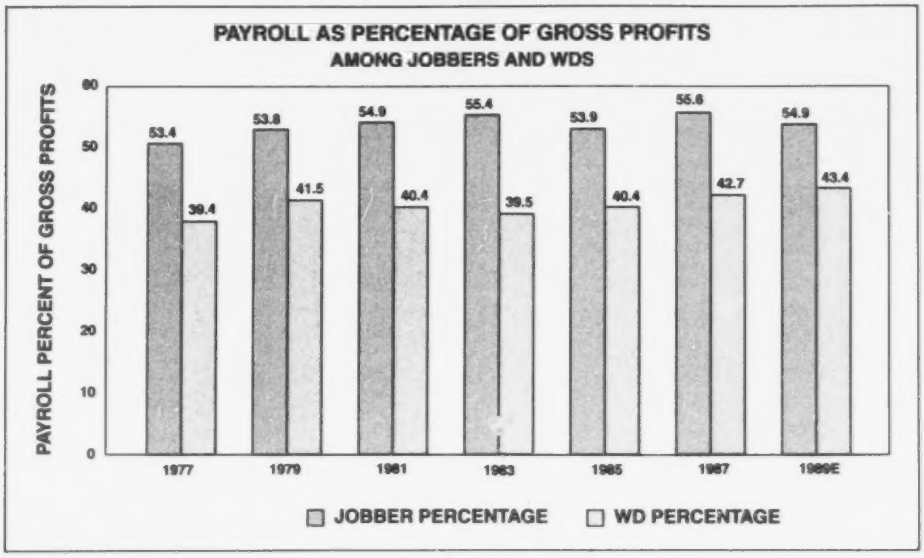
Source: Distributors Institute, Inc.



WD Inventory Turnover

WD Turnover dropped again in 1988 but may have recovered slightly in 1989, according to estimates. Slow moving SKUs are increasing as the vehicle mix expands and ages. Many WDs are questioning whether or not average order fill above the 93 percent level is profitable given the increased inventory investment necessary to sustain that rate.

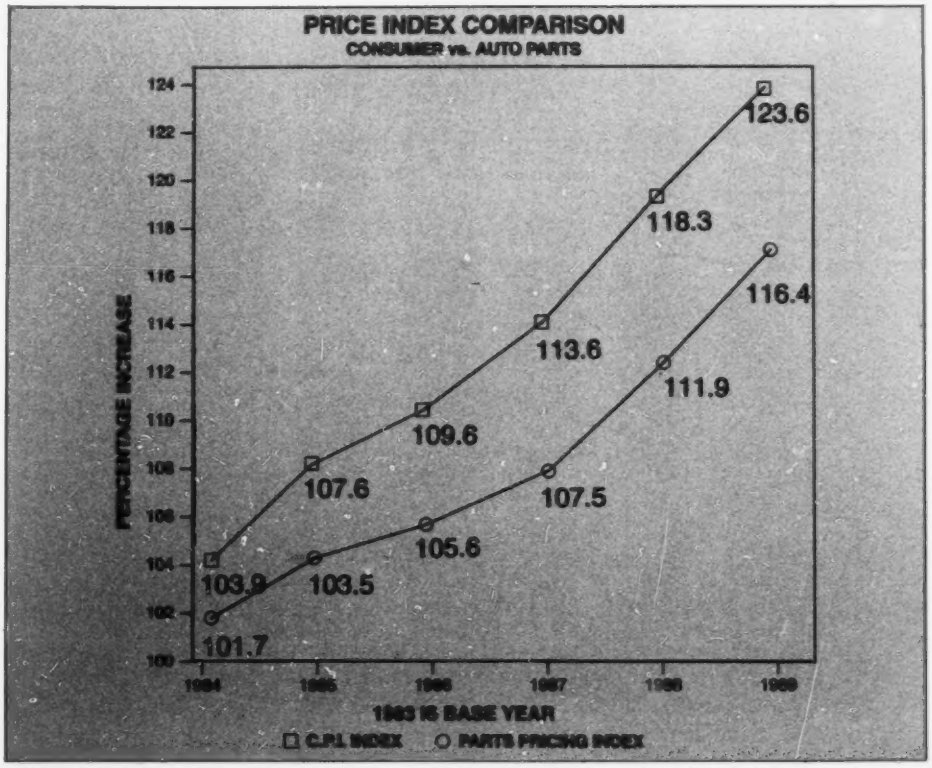
Source: Distributors Institute, Inc.



Payroll As Percentage Of Gross Profit

There has been very little change in the average number of employees over the 10 years charted. Estimates for final 1989 figures indicate a slight improvement in this key measurement but certainly not enough to be more optimistic about gross profits offsetting the labor cost involved in meeting service expectations.

Source: Distributors Institute, Inc.



Price Index Comparison

The Parts Price Index continues to lag behind the Consumer Price Index indicating the fierce competitive pricing battles have not eased. The CPI is one measurement of the steady increases in basic operating costs not being offset by added gross margin dollars.

Source: Distributor's Institute, Inc.

Warehouse Distributor/Jobber 10 Year Real Growth Analysis

	Percent Sales Change				Real Sales Growth		
	J/R	WD	All	Inflation	J/R	WD	All
1980	3.5	2.5	2.5	11.0	−7.5	−8.5	−8.5
	(103.5)	(102.5)	(102.5)	(122.9)	(92.5)	(91.5)	(91.5)
1981	10.4	9.3	9.6	8.9	1.5	−0.4	0.7
	(114.3)	(112.0)	(112.3)	(119.8)	(93.9)	(91.1)	(92.1)
1982	5.7	5.6	5.6	5.0	0.7	0.6	0.6
	(120.8)	(118.3)	(118.6)	(125.8)	(94.5)	(91.7)	(92.6)
1983	2.1	4.1	3.8	2.2	−0.1	1.9	1.6
	(123.3)	(123.1)	(123.1)	(128.5)	(94.4)	(93.4)	(94.1)
1984	8.7	11.3	10.5	1.7	7.0	9.6	8.8
	(134.0)	(137.1)	(136.1)	(130.7)	(101.1)	(102.4)	(102.4)
1985	0.9	−0.1	0.2	1.8	−0.9	−1.9	−1.6
	(135.2)	(136.9)	(136.4)	(130.7)	(100.1)	(100.4)	(100.7)
1986	5.3	−2.5	0.0	2.0	3.3	−4.5	−1.9
	(142.4)	(133.4)	(136.4)	(133.3)	(103.4)	(95.9)	(98.8)
1987	5.3	−0.2	2.1	1.8	3.5	−2.0	0.3
	(150.0)	(133.2)	(139.2)	(135.7)	(107.0)	(94.0)	(99.1)
1988	3.5	3.3	3.4	4.1	0.6	−0.8	−0.7
	(155.2)	(137.6)	(143.9)	(141.3)	(107.6)	(93.2)	(98.4)
1989	1.9	3.7	2.8	4.2	−2.3	−0.5	−1.4
	(158.1)	(142.7)	(148.0)	(147.2)	(105.1)	(92.7)	(99.8)
Average	4.7	3.7	4.0	4.3	0.4	−0.6	−0.2

Key: Percent yearly change
(Compound change)

Source: Distributors Institute, Inc.

U.S. Battery Shipments by Year

Year	Replacement	Original Equipment	Total Number
1976	49,202,906	12,551,090	61,753,996
1977	54,600,707	14,717,697	69,318,404
1978	56,389,494	15,192,304	71,581,798
1979	53,746,314	14,389,748	68,136,062
1980	50,063,224	10,018,409	60,081,633
1981	53,597,906	10,005,102	63,603,008
1982	54,214,456	8,372,942	62,587,398
1983	56,104,752	10,822,900	66,927,652
1984	59,332,509	12,765,218	72,097,727
1985	58,683,589	13,466,528	72,150,117
1986	60,306,004	13,272,013	73,578,017
1987	59,877,656	13,082,078	72,959,734
1988	63,487,361	13,771,455	77,258,816
1989	64,433,058	13,232,101	77,665,159

Source: Battery Council International

Annual U.S. Motor Vehicle Production and Factory Sales

	Production			Factory Sales		
Year	Passenger Cars	Motor Trucks and Buses	Total Vehicles	Passenger Cars	Motor Trucks and Buses	Total Vehicles
1989	6,823,097	4,028,958	10,852,055	6,807,416	4,061,950	10,869,366
1988	7,110,728	4,100,550	11,211,278	7,104,617	4,120,574	11,225,191
1987	7,098,910	3,825,776	10,924,686	7,085,147	3,821,410	10,906,557
1986	7,828,783	3,505,992	11,334,775	7,516,189	3,392,885	10,909,074
1985	8,184,821	3,467,922	11,652,743	8,002,259	3,356,905	11,359,164
1984	7,773,332	3,151,449	10,924,781	7,621,176	3,075,325	10,696,501
1983	6,781,184	2,443,637	9,224,821	6,739,223	2,413,897	9,153,120
1982	5,073,496	1,912,099	6,985,595	5,049,184	1,906,455	6,955,639
1981	6,253,138	1,689,778	7,942,916	6,255,340	1,700,908	7,956,248
1980	6,375,506	1,634,335	8,009,841	6,400,026	1,667,283	8,067,309
1979	8,433,662	3,046,331	11,479,993	8,419,226	3,036,706	11,455,932
1978	9,176,635	3,722,567	12,899,202	9,165,190	3,706,239	12,871,429
1977	9,213,654	3,489,128	12,702,782	9,200,849	3,441,521	12,642,370
1976	8,497,893	2,999,703	11,497,596	8,500,305	2,979,476	11,479,781
1975	6,716,951	2,269,562	8,986,513	6,712,852	2,272,160	8,985,012
1974	7,324,504	2,746,538	10,071,042	7,331,256	2,727,313	10,058,569
1973	9,667,152	3,014,361	12,681,513	9,657,647	2,979,688	12,637,335
1972	8,828,205	2,482,503	11,310,708	8,823,938	2,446,807	11,270,745
1971	8,583,653	2,088,001	10,671,654	8,584,592	2,053,146	10,637,738
1970	6,550,128	1,733,821	8,283,949	6,546,817	1,692,440	8,239,257
1969	8,224,392	1,981,519	10,205,911	8,223,715	1,923,179	10,146,894
1968	8,848,620	1,971,790	10,820,410	8,822,158	1,896,078	10,718,236
1967	7,412,659	1,611,077	9,023,736	7,436,764	1,539,462	8,976,226
1966	8,604,712	1,791,586	10,396,298	8,598,326	1,731,084	10,329,410
1965	9,335,227	1,802,603	11,137,830	9,305,561	1,751,805	11,057,366
1964	7,745,492	1,562,368	9,307,860	7,751,822	1,540,453	9,292,275
1963	7,644,377	1,464,399	9,108,776	7,637,728	1,462,708	9,100,436
1962	6,943,334	1,253,977	8,197,311	6,933,240	1,240,168	8,173,408
1961	5,522,019	1,130,919	6,652,938	5,542,707	1,133,804	6,676,511
1960	6,703,108	1,202,011	7,905,119	6,674,796	1,194,475	7,869,271
1959	5,599,492	1,124,096	6,723,588	5,591,243	1,137,386	6,728,629
1955	7,950,377	1,253,672	9,204,049	7,920,186	1,249,106	9,169,292
1950	6,628,598	1,377,261	8,005,859	6,665,863	1,337,193	8,003,056
1945	83,786	701,090	784,876	69,532	655,683	725,215
1940	3,728,491	784,404	4,512,895	3,717,385	754,901	4,472,286
1935	3,252,244	694,690	3,946,934	3,273,874	697,367	3,971,241
1930	2,784,745	571,241	3,355,986	2,787,456	575,364	3,362,820
1925	N.A.	N.A.	N.A.	3,735,171	530,659	4,265,830
1920	N.A.	N.A.	N.A.	1,905,560	321,789	2,227,349
1915	N.A.	N.A.	N.A.	895,930	74,000	969,930
1910	N.A.	N.A.	N.A.	181,000	6,000	187,000
1905	N.A.	N.A.	N.A.	24,250	750	25,000
1900	N.A.	N.A.	N.A.	4,192	N.A.	4,192

Source: Motor Vehicle Manufacturers Association of the U.S., Inc., and *Ward's Automotive Reports.* N.A.—Not Available.

1988 Motor Bus Registration

	Private and Commercial		Publicly Owned			
	Commercial Buses[1]	School and Other[2]	Federal	School[3]	Total School Buses	Total Buses
Alabama	2,010	180	38	6,215	6,395	8,443
Alaska	1,199	531	70	234	765	2,034
Arizona	1,103	203	363	2,567	2,770	4,236
Arkansas	44	1,105	28	4,081	5,186	5,258
California	13,835	9,005	434	14,259	23,264	37,533
Colorado	614	842	41	4,022	4,864	5,519
Connecticut	2,515	5,438	11	696	6,134	8,660
Delaware	332	1,309	5	150	1,459	1,796
District of Columbia	2,327	150	228	100	250	2,805
Florida	3,641	1,136	193	30,573	31,709	35,543
Georgia	1,148	2,177	99	14,408	1,585	17,832
Hawaii	2,622	685	26	851	1,536	4,184
Idaho	851	397	147	2,089	2,486	3,484
Illinois	5,260	10,177	79	2,514	12,691	18,030
Indiana	4,219	5,133	51	11,347	16,480	20,750
Iowa	1,116	267	12	7,000	7,267	8,395
Kansas	382	1,179	12	2,191	3,370	3,764
Kentucky	1,156	728	148	7,685	8,413	9,717
Louisiana	870	14,158	23	4,554	18,712	19,605
Maine	174	436	11	5,168	5,604	5,789
Maryland	2,658	3,863	141	4,210	8,073	10,872
Massachusetts	3,444	7,066	77	347	7,413	10,934
Michigan	2,522	6,385	73	13,537	19,922	22,517
Minnesota	2,213	3,775	7	7,083	10,858	13,078
Mississippi	810	2,235	75	5,220	7,455	8,340
Missouri	1,033	2,873	34	7,641	10,514	11,581
Montana	395	673	19	852	1,525	1,939
Nebraska	525	570	9	3,021	3,591	4,125
Nevada	1,345	155	139	114	269	1,753
New Hampshire	346	993	2	299	1,292	1,640
New Jersey	5,372	8,994	61	3,000	11,994	17,427
New Mexico	547	2,013	294	562	2,575	3,416
New York	12,639	6,529	206	7,971	14,500	27,345
North Carolina	1,968	7,051	53	24,508	31,559	33,580
North Dakota	108	460	66	1,470	1,930	2,104
Ohio	7,928	3,022	78	22,586	25,608	33,614
Oklahoma	353	1,466	130	10,775	12,241	12,724
Oregon	1,440	2,133	66	6,266	8,399	9,905
Pennsylvania	8,155	15,722	115	6,363	22,085	30,355
Rhode Island	287	1,239	5	5	1,244	1,536
South Carolina	886	3,718	32	9,053	12,771	13,689
South Dakota	283	389	118	1,213	1,602	2,003
Tennessee	1,769	370	70	9,605	10,975	12,814
Texas	3,116	12,354	234	44,371	56,725	60,075
Utah	324	75	38	718	793	1,155
Vermont	92	541	4	785	1,326	1,422
Virginia	2,174	243	215	13,613	13,856	16,245
Washington	765	1,990	183	4,702	6,692	7,640
West Virginia	914	64	42	2,752	2,816	3,772
Wisconsin	1,489	6,707	22	41,108	10,815	12,326
Wyoming	808	127	9	1,422	1,549	2,366
Total	112,126	160,031	4,636	338,876	498,907	615,669

Source: U.S. Department of Transportation, Federal Highway Administration, Table MV-10. [1]The numbers of private and commercial buses given here are estimates by the Federal Highway Administration of the numbers in use, rather than the registration counts of the states. [2]In some instances, church, industrial and other private buses are included here; and in other instances, privately-owned school buses could not be segregated from commercial buses, and are included with the latter. [3]This column consists primarily of publicly-owned school buses but includes a few privately-owned school, institutional and industrial buses registered free or at a reduced rate. Municipally-owned transit buses are included with commercial buses.

United States Motor Truck Registrations by State

State	Privately Owned[1] 1987	Privately Owned[1] 1988	Privately and Publicly Owned[2] 1987	Privately and Publicly Owned[2] 1988
Alabama	881,940	929,593	904,778	952,724
Alaska	122,281	123,041	130,212	130,570
Arizona	686,587	758,961	761,574	773,133
Arkansas	494,614	567,547	504,135	576,982
California	4,348,687	4,603,104	4,542,095	4,802,909
Colorado	785,609	774,323	806,834	795,954
Connecticut	135,011	132,497	154,904	153,030
Delaware	102,854	110,106	105,520	112,858
Florida	2,015,757	9,045	2,127,115	14,082
Georgia	1,374,780	2,121,082	1,411,918	2,234,913
Hawaii	76,673	1,447,996	81,784	1,487,407
Idaho	344,665	81,502	364,426	86,777
Illinois	1,379,729	322,377	1,401,383	342,466
Indiana	911,047	1,421,455	940,227	1,443,443
Iowa	731,375	1,047,387	754,105	1,078,561
Kansas	665,728	718,340	682,455	741,968
Kentucky	857,215	666,399	899,387	682,923
Louisiana	901,815	879,579	918,459	923,606
Maine	221,669	930,629	230,498	947,584
Maryland	561,079	216,881	578,745	226,409
Massachusetts	455,243	581,116	482,746	599,396
Michigan	1,376,678	457,519	1,441,387	485,334
Minnesota	670,078	1,497,314	691,569	1,562,865
Mississippi	393,883	674,127	407,780	693,917
Missouri	1,020,689	402,653	1,035,184	415,833
Montana	220,321	1,060,161	276,996	1,074,932
Nebraska	421,561	278,315	433,498	290,543
Nevada	209,554	433,342	221,609	446,213
New Hampshire	175,361	220,032	184,493	232,338
New Jersey	473,570	183,150	545,958	192,945
New Mexico	461,542	422,992	478,501	497,664
New York	1,154,789	457,286	1,203,935	474,729
North Carolina	1,297,981	1,202,235	1,345,681	1,251,278
North Dakota	256,874	1,341,970	264,945	1,391,956
Ohio	1,438,152	260,392	1,488,171	267,952
Oklahoma	909,726	1,522,328	863,586	1,574,578
Oregon	555,704	839,342	575,914	874,347
Pennsylvania	1,381,938	535,590	1,431,245	556,547
Rhode Island	103,547	1,431,740	108,466	1,482,124
South Carolina	550,283	108,854	569,667	113,964
South Dakota	251,150	580,940	262,206	600,798
Tennessee	783,917	265,715	819,882	276,961
Texas	3,658,414	800,700	3,841,106	839,400
Utah	347,833	3,701,828	359,031	3,890,394
Vermont	107,114	359,827	111,103	371,338
Virginia	970,276	112,967	998,259	116,996
Washington	1,084,745	999,046	1,118,075	1,028,983
West Virginia	333,301	1,092,180	369,248	1,126,375
Wisconsin	671,483	339,879	705,657	376,374
Wyoming	185,461	684,654	193,778	719,563
District of Columbia	9,321	185,983	14,224	194,432
Total	39,529,604	40,896,021	41,144,454	42,529,368

Source: U.S. Department of Transportation, Federal Highway Administration, Table MV-9. [1]Excludes farm trucks registered in certain states and restricted to use in vicinity of owner's farm. There were 64,120 such trucks in the 1988 count. [2]Includes federal, state, county and municipal vehicles; excludes vehicles owned by military services. Note: Registrations shown here are not synonymous with vehicles in use since the latter implies a count of vehicles in operation on a specific date or an average for a period of time, while registrations are a count of transactions (with transfers eliminated) during a specified period.

Trailer, Truck Tractor and Light Truck Registration

Private and Commercial Trailers[1]

	Commercial Trailers[2]	Light Farm & Car Trailers[3]	House Trailers[4]	Total Trailers	Truck Tractors[5]	Light Trucks[5]
Alabama	42,720	50,149	28,036	120,905	45,349	845,564
Alaska	9,773	—	41,525	51,298	2,224	114,519
Arizona	43,491	153,846	75,802	273,139	9,228	729,195
Arkansas	42,064	264,307	13,188	319,559	14,168	509,559
California	553,529	799,877	404,483	1,757,889	76,846	3,660,324
Colorado	56,336	169,009	71,162	296,507	8,603	687,680
Connecticut	27,094	139,518	—	166,612	4,398	118,196
Delaware	16,004	26,165	—	42,169	6,022	94,604
District of Columbia	98	1,049	—	1,147	129	7,547
Florida	103,774	879,609	—	983,383	53,639	1,749,745
Georgia	83,831	340,901	24,060	448,792	49,643	1,322,590
Hawaii	3,575	15,410	—	18,985	1,087	76,121
Idaho	15,428	95,638	31,845	142,911	7,312	288,392
Illinois	126,218	334,166	84,423	544,807	55,088	1,161,021
Indiana	73,673	228,798	61,334	363,805	41,903	845,188
Iowa	54,571	211,524	84,575	350,670	43,582	537,050
Kansas	68,490	19,783	15,563	103,836	17,772	547,247
Kentucky	40,125	25,160	26,938	92,223	16,000	792,130
Louisiana	217,753	202,943	8,983	429,679	17,625	875,316
Maine	449,968	112,047	—	562,015	5,292	190,751
Maryland	18,070	171,171	—	189,241	14,873	518,772
Massachusetts	24,810	182,361	—	207,171	12,445	405,074
Michigan	88,040	614,027	98,735	800,802	52,747	1,263,425
Minnesota	93,782	437,461	69,434	600,677	17,183	511,008
Mississippi	27,332	57,286	8,444	93,062	7,925	353,267
Missouri	65,024	371,182	—	436,206	31,097	922,787
Montana	3,510	75,400	33,591	112,501	9,619	229,109
Nebraska	51,525	152,662	—	204,187	20,540	336,782
Nevada	4,928	64,398	26,389	95,715	2,828	209,511
New Hampshire	11,832	76,493	—	88,325	6,079	161,355
New Jersey	44,748	272,345	—	317,093	23,350	356,375
New Mexico	38,295	38,214	49,094	125,603	11,578	428,918
New York	40,931	487,563	—	528,494	31,245	1,057,584
North Carolina	85,141	411,018	4,931	501,090	55,648	1,179,694
North Dakota	16,826	20,083	14,775	51,684	6,742	194,554
Ohio	140,711	311,844	102,268	554,823	48,291	1,328,486
Oklahoma	52,312	50,897	6,029	109,238	11,863	743,685
Oregon	44,084	93,957	125,577	263,618	19,069	444,694
Pennsylvania	105,400	300,393	153,922	559,715	51,303	1,143,636
Rhode Island	6,812	31,318	—	38,130	3,806	95,638
South Carolina	34,638	27,521	116	62,275	11,770	540,376
South Dakota	23,705	72,394	21,921	118,020	8,490	231,499
Tennessee	26,714	36,658	66	63,438	29,326	739,966
Texas	197,012	1,094,582	—	1,291,594	126,290	3,415,580
Utah	11,222	67,258	45,520	124,000	9,295	328,706
Vermont	2,758	51,971	—	54,729	1,737	102,665
Virginia	68,945	141,242	60,391	270,578	29,139	891,217
Washington	121,606	305,693	87,612	514,911	24,141	969,567
West Virginia	16,400	35,329	18,918	70,647	4,427	315,573
Wisconsin	54,338	2,374	30,874	87,586	20,827	596,827
Wyoming	7,911	73,269	20,157	101,337	3,095	151,425
Total	3,557,877	10,198,263	1,950,681	15,706,821	1,182,669	35,320,494

Source: U.S. Department of Transportation, Federal Highway Administration, Tables MV-9 and MV-11. [1]The completeness of data on trailer registrations varies greatly. Data are reported to the extent available. [2]Includes all commercial type trailers and semitrailers that are in private or for-hire use. [3]Several states do not require the registration of light farm or automobile trailers. [4]Mobile homes and house trailers are shown in this column for states which require them to be registered and are able to segregate them from other trailers. In states where this classification is not available, house trailers are included with light car trailers. [5]The figures in these columns may vary from the numbers shown for prior years. This results from new information and changes in the estimating procedures. Where data reported by the states were incomplete, estimates were made by the FHA. Truck tractors may include some large trucks used regularly in combination with full trailers. Light trucks includes pickups, panels and delivery vans generally of 10,000 pounds or less gross vehicle weight.

Profile of Establishments

State	Machine Shop Jobbers	Paint/Body Supplies	Heavy Duty Parts/Supplies	Tires/ Accessories
Ala.	169	219	182	112
Alaska	5	30	30	12
Ariz.	149	123	132	73
Ark.	101	200	187	66
Calif.	892	555	766	382
Colo.	132	138	162	68
Conn.	101	126	121	72
Del.	22	27	19	16
D. of C.	2	5	3	2
Fla.	374	346	412	227
Ga.	221	283	282	127
Hawaii	30	46	38	33
Idaho	51	79	91	23
Ill.	537	539	425	218
Ind.	327	375	260	101
Iowa	200	317	237	96
Kan.	156	207	186	77
Ky.	147	225	159	85
La.	140	179	164	96
Maine	45	105	73	24
Md.	110	126	113	70
Mass.	188	220	183	105
Mich.	427	494	372	186
Minn.	202	253	197	100
Miss.	80	150	125	72
Mo.	260	306	250	113
Mont.	56	91	91	24
Neb.	117	143	112	42
Nev.	24	28	44	19
N.H.	36	74	57	32
N.J.	366	219	231	160
N.M.	56	53	80	26
N.Y.	556	596	530	348
N.C.	240	377	279	138
N.D.	55	78	62	25
Ohio	501	555	426	201
Okla.	124	169	160	64
Ore.	136	116	133	38
Pa.	504	694	468	326
R.I.	36	40	40	9
S.C.	121	174	135	75
S.D.	57	71	46	26
Tenn.	226	278	216	104
Texas	565	602	616	296
Utah	38	57	57	25
Vt.	18	53	37	16
Va.	143	269	218	117
Wash.	224	172	202	91
W. Va.	65	136	94	47
Wis.	262	325	210	112
Wyo.	26	56	43	17
Total	9,620	11,095	9,749	4,927

Influenced by JOBBER TOPICS

Hi-Performance Products	Ignition/ Electrical	Equipment/ Tools	Import Parts	Retail Sales	State
196	361	273	313	269	Ala.
17	40	42	38	35	Alaska
88	251	168	206	200	Ariz.
135	299	238	241	239	Ark.
686	1,607	1,033	1,541	1,372	Calif.
126	278	200	225	235	Colo.
100	232	182	219	188	Conn.
15	44	31	36	35	Del.
3	12	5	12	12	D. of C.
398	845	550	698	639	Fla.
298	512	384	439	398	Ga.
37	90	57	86	78	Hawaii
78	141	102	112	110	Idaho
344	958	692	642	728	Ill.
221	554	395	362	441	Ind.
207	454	330	284	362	Iowa
176	354	270	265	295	Kan.
125	322	233	243	210	Ky.
124	351	232	271	287	La.
45	126	92	97	108	Maine
92	274	204	213	197	Md.
134	429	303	336	310	Mass.
411	752	549	519	660	Mich.
133	343	288	247	272	Minn.
97	238	190	195	200	Miss.
263	538	387	385	413	Mo.
67	135	100	95	100	Mont.
87	208	165	137	170	Neb.
31	65	48	52	53	Nev.
37	106	86	87	83	N.H.
185	549	385	464	418	N.J.
57	126	94	100	101	N.M.
478	1,130	845	907	871	N.Y.
333	649	474	527	428	N.C.
39	96	92	72	74	N.D.
275	851	594	601	686	Ohio
155	337	259	246	271	Okla.
132	229	162	207	186	Ore.
387	1,099	775	742	827	Pa.
22	87	54	64	67	R.I.
150	273	221	242	205	S.C.
38	94	79	67	84	S.D.
204	457	315	367	319	Tenn.
554	1,354	887	1,022	1,109	Texas
57	112	86	88	85	Utah
23	60	45	56	47	Vt.
218	458	307	379	277	Va.
192	370	239	326	320	Wash.
75	161	128	128	109	W. Va.
183	466	334	304	373	Wis.
47	80	60	57	68	Wyo.
8,571	19,949	14,261	15,556	15,619	Total

Source: JOBBER TOPICS Circulation Files. Note: The sum of column total exceeds JOBBER TOPICS total circulation due to multiple mentions.

Car Production Milestones[1]

1912	1 millionth
1920	10 millionth
1935	50 millionth
1952	100 millionth
1960	150 millionth
1967	200 millionth
1972	250 millionth
1979	300 millionth
1986	350 millionth

Source: Motor Vehicle Manufacturers Association of the U.S., Inc., and *Ward's Automotive Reports.* [1]Based upon U.S. total factory sales data.

Truck and Bus Production Milestones[1]

1915	100,000th
1918	500,000th
1920	1 millionth
1929	5 millionth
1938	10 millionth
1953	25 millionth
1971	50 millionth
1979	75 millionth
1988	100 millionth

Source: Motor Vehicle Manufacturers Association of the U.S., Inc. and *Ward's Automotive Reports.* [1]Based upon U.S. total factory sales data.

Vehicle Production Milestones[1]

(Cars, Trucks, Buses Combined)

1906	100,000th
1912	1 millionth
1920	10 millionth
1931	50 millionth
1948	100 millionth
1955	150 millionth
1962	200 millionth
1968	250 millionth
1972	300 millionth
1982	400 millionth

Source: Motor Vehicle Manufacturers Association of the U.S., Inc., and *Ward's Automotive Reports.* [1]Based upon U.S. total factory sales data.